

# IRIS HR and Payroll Integration Guide

# **IRIS Payroll Professional**

November 2016



# **IRIS**

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### Introduction

This guide will give you an overview of how your IRIS HR and Payroll integrate with each other, from setting up your IRIS HR system to importing data into your payroll system.

The guide covers:

- Setting up IRIS HR
- First use configuration
- Importing data from IRIS HR to Payroll
- Importing data from Payroll to IRIS HR

#### What is IRIS HR and Payroll integration?

You can now import and export employee and pay element information, from your IRIS HR and Payroll software, at the click of a button. Your integrated systems will streamline your HR and payroll processes, reducing your administration and manual data entry tasks. This in turn will also reduce potential errors.

### Setting up the Import and Export files

You only need to complete this setup process once.

#### Installing the Import and Export definitions

- Download a zip file containing import, export and report definitions for your payroll software from here
- 2. Using an unzipping utility, unzip the files
- 3. Save the import files folder into your payroll program location

| About IRIS Payroll Professional 1.25.3  | 36   |
|---|--|
|   | © IRIS Payroll Solutions Ltd 2016  |
|   | IRIS Business Software Ltd   |
| (i)   | 4 Tetbury Close, Challenge Way,<br>Martland Park, Wilgan, WNS OLA.   |
| IRIS Payroll Professional 1.25.36 (18<br>DIL Version 1.25.36, Crystal Run<br>Program :- <u>C:\UPP</u><br>Data :- <u>C:\UPP</u>          | 9/11/2016 11:52)<br>bime Version :- 9.00   |
| Full Licence Details  |  |
| Licence No. 70001 - IRIS Software; I<br>IRIS Payroll Professional with Costin<br>This system is licenced for 10 Concur<br>each company. | Expiry Date: 02/12/2017<br>g, CIS, Pay Import, IRIS AE Suite <sup>74</sup> , Bureau<br>rent Users and Unlimited Companies with 5000 Employees in |
| Components Check for Update   | s Close  |

4. To check your payroll program location;

# Choose Help | About IRIS Payroll Professional.

Click on the **Program :-** location link. This will open the program location in Windows Explorer

**5.** Next, save the 'IRIS HR Elements' & 'IRIS HR Employee Elements' report files in your reports folder. This folder is located within your payroll program location.



#### **Creating the Report files**

- 1. Log into Iris Payroll and go to Reports | Report Table
- 2. Click on **Insert** to add a new line
- **3.** Select 'Company' as the report type and give the report a description of **'IRIS HR Elements'**. Set the Order column to None.
- Next, click into the Page 1 fields and then the Browse button. Select the report named 'IRIS HR Elements'.
- **5.** Repeat steps 7 to 9 but this time select the report type as 'Summary' and enter the description as '**IRIS HR Employee Elements'** and select this report when option using the browse button.

Click OK to close the Report Table.

#### **Export Pay Element Definitions to IRIS HR**

- 1. Remaining in the Reports menu, select 'Print Other Reports'.
- 2. Select 'IRIS HR Elements' from the list.
- **3.** From the next screen select the **Export** button then set the **Format** to be 'Text'. Click **OK**. On the next page set the number of lines per page to be 1000 and click **OK**.
- In the file explorer window, set the File Name to be IRIS HR Elements.csv. The file name <u>must</u> be 'IRIS HR Elements.csv' and the File Type <u>must</u> be Comma Separated (CSV)
- 5. Log into IRIS HR using the details provided in your Welcome email
- 6. Select System Tools | Utilities | Data | Import
- Click the Choose File option and browse to the location in which you saved the file from Payroll. Click Open
- 8. Ensure that 'Payroll Element Definition' is selected in the Form drop down and click Validate

| Data Import | Validate Example CSV             |
|-------------|----------------------------------|
| File        | Choose File iris hr elements.csv |
| Form        | Payroll Element Definition       |
|             |                                  |

Any validation issues will be detailed on screen and must be addressed before continuing. You can identify which element record contains a validation error by checking the spread sheet for the row number given in the validation message, next to the red flag. Correct the validation issue in Payroll and then follow the steps described above to export the data from payroll and revalidate in HR.

Once you have no validation issues you are ready to import the file.



- Click the Choose File option and browse to the location in which you saved the file from Payroll. Click Open
- 10. Click the **Import** option. You will receive confirmation that each row has imported successfully

#### Creating the Pay/Ded element import

- 1. In IRIS Payroll, go to File | Import/Export | Import Data
- 2. Click No to the 'Do you want to copy current structure?' message
- 3. Give the import a description of 'IRIS HR Pay Deds'
- Select the Fields tab and using the IRIS HR Elements report (from the Export Pay Element Definitions to IRIS HR section), add a line for each pay/ded and set the ID to match the external ID.

**Please Note:** You must enter the elements into the import fields grid in the order that they appear in the report.

| election   <u>D</u> etails <u>F</u> ields   O | lptions |      |                   |        |                  |   |                 |
|---|---------|------|-------------------|--------|------------------|---|-----------------|
| Field   | ID      | Line | Start<br>Position | Length | Default<br>Value | - | Chec <u>k</u>   |
| CODE  |         |      |                   |        |                  |   | C               |
| Salary To-date                                |         |      |                   |        |                  |   | <u>save</u>     |
| Pay/Ded Standard                              | 1       |      |                   |        |                  |   | la cast         |
| Pay/Ded Standard                              | 2       |      |                   |        |                  |   | Insert          |
| Pay/Ded Standard                              | 3       |      |                   |        |                  |   |                 |
| Pay/Ded Standard                              | 4       |      |                   |        |                  |   | Uelete          |
| Pay/Ded Standard                              | 5       |      |                   |        |                  |   |                 |
| Pay/Ded Standard                              | 6       |      |                   |        |                  |   | For <u>m</u> at |
| Pay/Ded Standard                              | 7       |      |                   |        |                  |   |                 |
| Pay/Ded Standard                              | 8       |      |                   |        |                  | • | S <u>e</u> t    |

**5.** This should be done for all static Amount type elements in the report.

**6.** Ensure to keep the **CODE** line and enter a line for 'Salary to Date'. The **ID** for this should be left blank along with SSP, SMP etc at the end of the file.

**7.** Save your import settings and return to the **Selection** tab.

#### **Creating the Units & Rates import definition**

- 1. From the selection tab, click Add
- 2. Click No to the 'Do you want to copy current structure?' message
- 3. Give the import a description of 'IRIS HR Units & Rates'

| election   Derails Tields | ODitions 1 |      |                   |        |                  |   |                 |
|---------------------------|------------|------|-------------------|--------|------------------|---|-----------------|
| Field                     | ID         | Line | Start<br>Position | Length | Default<br>Value |   | Chec <u>k</u>   |
| CODE                      |            |      |                   |        |                  | - | Cours           |
| Hourly Rate of Pay        | 1          |      |                   |        |                  |   | Jave            |
| Normal Hours              | 1          |      |                   |        |                  |   |                 |
| Hourly Rate of Pay        | 2          |      |                   |        |                  | _ | Insert          |
| Normal Hours              | 2          |      |                   |        |                  |   |                 |
| Hourly Rate of Pay        | 3          |      |                   |        |                  |   | Delete          |
| Normal Hours              | 3          |      |                   |        |                  |   | _               |
| Hourly Rate of Pay        | 4          |      |                   |        |                  |   | For <u>m</u> at |
| Normal Hours              | 4          |      |                   |        |                  |   |                 |
| Hourly Rate of Pay        | 5          |      |                   |        |                  | - | S <u>e</u> t    |

4. Select the **Fields** tab and using the IRIS HR Elements report (from the Export Pay Element Definitions to IRIS HR section), add 2 lines for each variable rate; one to be Hourly Rate of Pay' and one to be 'Normal Hours'. Each pair of items should have the **ID** set to match the external ID from the report.



**Please Note:** You must enter the elements into the import fields grid in the order that they appear in the report.

| Field                | ID | Line | Start<br>Position | Length | Default<br>Value |   | Chec <u>k</u> |
|----------------------|----|------|-------------------|--------|------------------|---|---------------|
| Pay/Ded Standard     | 17 |      |                   |        |                  | - | C             |
| Pay/Ded Standard     | 18 |      |                   |        |                  |   | 2446          |
| Pay/Ded Standard     | 19 |      |                   |        |                  |   | 1             |
| Pay/Ded Standard     | 20 |      |                   |        |                  |   | Insert        |
| SSP To-date          |    |      |                   |        |                  |   |               |
| SMP To-date          |    |      |                   |        |                  |   | Delete        |
| Student Loan To-date |    |      |                   |        |                  |   | -             |
| SAP To-date          |    |      |                   |        |                  |   | Format        |
| CDD To date          |    |      |                   |        |                  |   |               |

### Setting up your IRIS HR

#### Export employee data from payroll

- **1.** It is essential to ensure the mandatory employee fields required by IRIS HR are completed prior to creating the export file
- 2. From the File menu, select Export Data
- 3. On the Selection tab choose IRIS HR Export

| <b>1</b>          | Data Export - IRIS HR Export   |       |
|-------------------|--|-------|
| Selection         | aiis   <u>F</u> ields  |       |
|                   | Description       ▲dd         * Example Employee Creation Import       *         * General Personnel Import       *         * Info Support Personnel Import       *         * KPMG P110       *         * Minimum New Employee Import       *         * P11D Export       *         * SOMS V HRPersonnel Import       *         * Solect HR       ▼         IRIS HR Export       ▼ |       |
|                   |  | ~     |
|                   |  | Llose |
|                   | Data Export - IRIS HR Export   |       |
| 1<br>Selection De | Data Export - IRIS HR Export   |       |
| I<br>Selection De | Export - IRIS HR Export         alls         Fields         [IRIS HR employee.csv         Browse   |       |
| C<br>Selection De | Export - IRIS HR Export         alls         Export File         [FIIS HR employee.csv         Browse         File Type         C         Fixed Length Format         ©         Comma Separated (CSV)  |       |

- On the **Details** tab browse to the location where you want to save the export file. The file name <u>must be</u> 'IRIS HR Employee.csv' and the File Type <u>must</u> be Comma Separated (CSV)
- 5. Click Export



#### Send your employee data to us

Once you have exported your employees' data from Payroll, you need to upload the export file to the Support Team for them to create your employees in IRIS HR.

- 1. Log into IRIS HR using the details provided in your Welcome email
- 2. From the left-hand sidebar select My Details

| •          | IRIS             |                   |                |      |                      |      | IRIS HF<br>My Detai | R Support<br>Is / Logoff | 2                   |   |
|------------|------------------|-------------------|----------------|------|----------------------|------|---------------------|--------------------------|---------------------|---|
|            |                  |                   |                |      |                      |      |                     | Absence                  | Dashboard Profile   |   |
| Ноте       | 2                |                   |                |      |                      |      |                     |                          | Available actions 🔻 |   |
| 公          | ноте             | Pendina Absence > | ) IRIS HR Suda | oort |                      |      |                     | My Summa                 | ry View All         | ^ |
|            | Company Handbook | 5                 |                |      |                      |      |                     |                          |                     |   |
| (8         | My Details       | Holiday           |                | Sie  | kness                |      |                     | Unauthorised             |                     |   |
| A          | Directories      | Entitlement       | 0.00           | То   | tal Taken            | 0.00 |                     | Total Taken              | 0.00                |   |
|            |                  | Brought Forward   | 0.00           | Oc   | casions              | 0.00 |                     |                          |                     |   |
| //         | System Tools     | Total this Year   | 0.00           | Ro   | olling Year          |      |                     |                          |                     |   |
| <u>(</u> ) | Guide            | Taken this Year   | 0.00           | Ro   | lling Year Occasions |      |                     |                          |                     |   |
|            |                  | Remaining         | 0.00           | Br   | adford Score         |      |                     |                          |                     |   |
|            |                  | Request           |                |      |                      |      |                     | View Group               |                     |   |
|            |                  |                   |                |      |                      |      |                     |                          |                     |   |
|            |                  |                   |                |      |                      |      |                     |                          |                     |   |
|            |                  | No records found. |                |      |                      |      |                     |                          |                     |   |
|            |                  |                   |                |      |                      |      |                     |                          |                     | ~ |

3. From the tabs at the top of the screen, select **Documents** 

| <b>IRI</b>    | S                 |             |          |         |              |           |                          | IRIS HR S<br>My Details | Support<br>/ Logoff | ٩         |              |   |
|---------------|-------------------|-------------|----------|---------|--------------|-----------|--------------------------|-------------------------|---------------------|-----------|--------------|---|
|               |                   | Personal    | Contract | Payroll | Absence      | Accidents | Benefits                 | Documents               | Equipment           | Pro. Mem. | Training     |   |
| Home          | My Details        |             |          |         |              |           |                          |                         |                     | Availa    | able actions | • |
| С ноте        | Personal          | » IRIS HR   | Support  |         |              |           |                          |                         | Sav                 | e         | Cancel       | ^ |
| Company I     | Handbook<br>Title |             |          |         | ~            |           | Employee Nur             | mber                    | 0                   |           | <b>_</b> •   |   |
| A Directories | Forename:         | 5           | IRIS HR  |         |              |           | Work Email<br>Work Phone |                         |                     |           |              |   |
| // System To  | ols Surname       |             | Support  |         | •            | •         | Work Extn.               |                         |                     |           |              |   |
| (i) Guide     | Initials          |             |          |         |              |           | Work Mobile              |                         |                     |           |              |   |
|               | Address           |             |          |         | ^            |           | Personal Emai            | il                      |                     |           |              |   |
|               |                   |             |          |         |              |           | Personal Mob             | ile                     |                     |           |              |   |
|               |                   |             |          |         | ~            |           | Home Phone               |                         |                     |           |              |   |
|               | Gender            |             |          |         | $\checkmark$ | •         |                          |                         |                     |           |              |   |
|               | Marital Sta       | tus         |          |         | $\checkmark$ |           |                          |                         |                     |           |              |   |
|               | Date of Bir       | th (Age: 0) |          |         |              | •         |                          |                         |                     |           |              | ~ |



#### 4. Click Create New

# **IDIC**

|      | RIS              |                    |                  |                   |               | IS HR Support<br>Details / Logoff | Q                  |   |
|------|------------------|--------------------|------------------|-------------------|---------------|-----------------------------------|--------------------|---|
|      |                  | Personal           | Contract Payroll | Absence Accidents | Benefits Docu | ments Equipment                   | Pro. Mem. Training |   |
| Home | My Details       |                    |                  |                   |               |                                   | Available actions  | • |
| ŵ    | Home             | Documents » IRIS F | HR Support       |                   |               |                                   | Create New         | ) |
|      | Company Handbook |                    |                  |                   |               |                                   |                    |   |
|      | My Details       | Description        | Category         | $\checkmark$      |               |                                   |                    |   |
| 8    | Directories      |                    |                  |                   |               |                                   |                    |   |
|      | System Tools     | Date               | Oescription      | Categ             | ory           | Review Date                       |                    |   |
|      | Guide            | 02/06/2016         | Broadcast Email  |                   |               |                                   | $\times$           |   |
|      |                  |                    |                  |                   |               |                                   |                    |   |

5. On the **Documents** >> window, complete the mandatory Date and Description fields

**Date** should be set to the date you're uploading the file and **Description** should be set to 'Notes'

Tick Add Document

6. Click Save

7. On the **Documents** >> file upload screen, select **Choose File** 

| Date           | 07/06/2016 | •     |
|----------------|------------|-------|
| Description    | Notes      | · •   |
| Category       |            | ٣     |
| Notes          |            |       |
|                |            |       |
|                |            |       |
| Poviow Data    |            |       |
| Review Date    |            |       |
| Status         |            |       |
|                |            |       |
|                |            | /     |
| Employee Photo |            |       |
| Add Document   |            |       |
|                |            |       |
|                |            |       |
|                |            |       |
|                | Save       | Close |
|                |            |       |

IRIS HR Support



8. Browse to your payroll employees' export file. Once you have selected your export file, click Open



9. You will then be returned to the **Documents** >> file upload screen, click **Upload** 

This uploads your payroll employees' export file to us. If for any reason you need to delete this file, you should click in the  ${\bf X}$ 

#### Send your company's branding requirements to us

You only need to complete these steps if you have chosen to have your company's branding on your IRIS HR system. If you don't require us to add your company's branding, please go to Email IRIS Support

Your company logo must be a maximum of 160 x 65 pixels

To check the pixels on your company's logo:

Right click on the logo image, select **Properties** and then select the **Details** tab. The image's pixel size is in the **Image** section

| Property       | Value                    | 1 |
|----------------|--------------------------|---|
| Origin         |                          |   |
| Date taken     |                          |   |
| Image          |                          |   |
| Dimensions     | 160 x 49                 |   |
| Width          | 160 pixels               |   |
| Height         | 49 pixels                |   |
| Bit depth      | 32                       |   |
| File           |                          |   |
| Name           | IRIS logo.png            |   |
| Item type      | PNG image                |   |
| Folder path    | C:\Users\ttaylor\Desktop |   |
| Date created   | 06/06/2016 17:14         |   |
| Date modified  | 06/06/2016 17:16         |   |
| Size           | 3.95 KB                  |   |
| Attributes     | A                        |   |
| Availability   | Available offline        |   |
| Offline status |                          |   |
| Channel with   |                          |   |

We will take your branding colours from your company's logo.

#### Email IRIS Support - payroll employees uploaded and branding requirements

- **1.** Once you have uploaded the export file of your payroll employees you should inform IRIS Support replying to the email received from the Support team
- 2. To send us your company's logo, you should reply to the email received from the Support team



#### Checks you should make after your IRIS HR system has been setup

After payroll data has been imported into your new IRIS HR system, the employee's hours will be set as follows:

| Band in payroll     | Hours set in IRIS HR |
|---------------------|----------------------|
| A – Up to 15.99 hrs | 15.99                |
| B – 16.00-23.99 hrs | 23.99                |
| C – 24.00-29.99 hrs | 29.99                |
| D – 30 hrs or more  | 37.50                |
| E – Other           | 0.00                 |

## How to Import from IRIS HR to Payroll

Each pay period, you may wish to update your Payroll system with changes made to employee details and pay elements in the IRIS HR system before processing your payroll. Follow these steps to import new starters, update employee details and pay element information from IRIS HR to Payroll.

#### From your IRIS HR software

- 1. Log into IRIS HR using the details provided in your Welcome email
- 2. It is essential to ensure the mandatory employee fields required by Payroll are completed prior to creating the export file
- 3. Go to System Tools | Utilities | Payroll | Export to Payroll

| <b>IRIS</b>       |                   |  | John Cooper<br>My Details / Logoff | ٩             |           |
|-------------------|-------------------|--|------------------------------------|---------------|-----------|
|                   |                   |  | Exports & Reports                  | Lookup Tables | Utilities |
| Home System Tools |                   |  |                                    |               |           |
| ☆ Home            | Utilities         |  |                                    |               |           |
| Company Handbook  | Absence           |  |                                    |               |           |
|                   | Company           |  |                                    |               |           |
| A Directories     | Pavroll           |  |                                    |               |           |
| 🏸 System Tools    |                   |  |                                    |               | _         |
|                   | Export to Payroll |  |                                    |               |           |
|                   | Matrix            |  |                                    |               |           |
|                   | Tools             |  |                                    |               |           |
|                   |                   |  |                                    |               |           |



#### 4. Choose the **Pay Type**

| <b>IRIS</b>       |                   |                |            |       | John Cooper<br>My Details / Logoff | Q             |           |
|-------------------|-------------------|----------------|------------|-------|------------------------------------|---------------|-----------|
| Home System Tools |                   | Payroll Calcul | ation (1)  |       | Exports & Reports                  | Lookup Tables | Utilities |
| 🖒 Home            | Utilities         | Рау Туре       | Monthly    | Ŧ     |                                    |               |           |
| Company Handbook  | Absence           | From           | 01/05/2016 |       |                                    |               |           |
| A My Details      | Company           | То             | 31/05/2016 |       |                                    |               |           |
| A Directories     | Payroll           |                |            |       |                                    |               |           |
| / System Tools    |                   |                | Set        | Close |                                    |               |           |
|                   | Export to Payroll |                |            |       |                                    |               |           |
|                   | Matrix            |                |            |       |                                    |               |           |
|                   | Tools             |                |            |       |                                    |               |           |

- 5. Enter the payroll From and To dates
- 6. Click **Set**, this will create a zip file containing the following files:
  - a. IRIS HR Employee.csv contains employee detail and new starter information
  - b. **IRIS HR Pay Deds.csv** contains any static pay element amounts which fall within the payroll from and to date in step 5.
  - c. **IRIS HR Units & Rates.csv** contains any variable rate type pay element amounts which fall within the payroll from and to date in step 5.
- 7. Using an unzipping utility, unzip Payroll Export.zip and save to a location on your computer



8. Using an unzipping utility, unzip **IRIS HR Employee.csv** and save to a location on your computer

#### From your Payroll Software

- 1. Log into Payroll
- 2. From the File menu select Import Data
- 3. On the Selection tab choose IRIS HR Import



- On the **Details** tab check the location in **Import File** is where you saved the export file from IRIS HR
- 5. Set File Type as Comma Separated (CSV)

This will update your employee detail information.



#### 6. Click Import

- **7.** Repeat the steps above, this time selecting the IRIS HR Pay Deds import and the file named IRIS HR Pay Deds.
- 8. Repeat steps 3 6 above, this time selecting the IRIS HR Units & Rates import and the file named IRIS HR Units & Rates.

**Please Note:** After you have imported data into a new Payroll company, prior to running your first payroll you need to ensure the following:

- For new starters, under **Employee | Starter Details**, choose the **Starting Declaration** from **A**, **B**, **C** or **P46 not completed**
- If an individual is not a new employee to the company, select the Employee | Starter Details | Starter Status, Existing Employee (this is not a new employee to the company)
- Under Employee Details | Pay Elements | Loans, enter Student Loan details, if applicable, for instance Student Loan Plan Type and Start Date
- After your first import, in Employee Details | To-Dates, ensure the Previous Employment Gross Pay and Tax Paid values are entered

# 

## How to Import from Payroll to IRIS HR

Each pay period, you may wish to update your HR system with any employee details and pay element information that has been updated in the Payroll software during payroll processing time. Follow these steps to import these changes from Payroll to IRIS HR.

#### From your Payroll Software

- 1. Log into IRIS Payroll
- 2. From the File Menu select Export Data
- 3. On the Selection tab choose IRIS HR Export



- On the **Details** tab browse to the location where you want to save the export file. The file name <u>must</u> be **'IRIS HR Employee.csv'** and the **File Type** <u>must</u> be Comma Separated (CSV)
- 5. Click Export

| 🖬 🛛 🛛 Data Exp                       | oort - IRIS HR Export              |
|--------------------------------------|------------------------------------|
| Selection Details Fields             |                                    |
| Export File<br>[IRIS HR employee.csv | <u>B</u> rowse                     |
| ⊂ File Type<br>○ Fixed I<br>☞ Comm   | .ength Format<br>a Separated (CSV) |
|                                      | <u>E</u> xport <u>C</u> lose       |

- From the **Reports** menu option, select **Print Summaries** and select IRIS HR Employee Elements
- 7. Click **Export** and **OK**, ensuring that the **Format** is set to Text and **Destination** is set to Disk
- In the file explorer window, set the File Name to be IRIS HR Elements.csv. The file name <u>must</u> be 'IRIS HR Employee Elements.csv' and the File Type <u>must</u> be Comma Separated (CSV)

#### From your IRIS HR software

- 9. Log into IRIS HR using the details provided in your Welcome email
- 10. Select System Tools | Utilities | Data | Import



 Click the Choose File option and browse to the location in which you saved the 'IRIS HR Employee.csv' file from Payroll. Click Open

| <b>IRIS</b>                    |             | ٢             | Em Wade<br>My Details / Logoff | Q                |               |
|--------------------------------|-------------|---------------|--------------------------------|------------------|---------------|
|                                |             | Communication | Exports & Reports              | Lookup Tables    | Utilities     |
| Home System To                 | pols        |               |                                | Available        | e actions 🔍 🔻 |
| Home<br>Company Handbook       | Data Import |               |                                | Validate Exa     | mple CSV      |
| My Details<br>Reward Statement | File        |               | Choose File                    | • No file chosen | •             |
| Directories<br>System Tools    | Form        |               | Personal                       |                  | •             |
| Guide                          |             |               |                                |                  |               |

- 12. Ensure that 'Personal' is selected in the Form drop down and click Validate
- 13. Any validation issues will be detailed on screen and must be addressed before continuing. You can identify which employee record contains a validation error by checking the spread sheet for the row number given in the validation message, next to the red flag. Correct the validation issue in Payroll and then follow the steps described above to export the data from payroll and revalidate in HR.

| Home System To                             | pols   | Available actions          |
|--|--|----------------------------|
| Home<br>Company Handbook                   | Data Import  | Validate Example CSV       |
| My Details<br>Reward Statement             | File   | Choose File No file chosen |
| Directories<br>System Tools<br>Recruitment |  |                            |
|  | <ul> <li>0 lines of 1 ready for import. 1 line contains errors</li> <li>1 NICode (NI Code) cannot be O (A,B,C,D,E,F,G,H,J,L,M,S,X,Z)</li> <li>The CSV file is being processed</li> </ul> |                            |

Once you have no validation issues you are ready to import the file.

- **14.** Click the **Choose File** option and browse to the location in which you saved the file from Payroll. Click **Open**
- 15. Click the Import option

# **IRIS**

| Home System Too  | ls  | Available actions                |
|------------------|---|----------------------------------|
| Home             | Data Import                                 | Validate Import Example CSV      |
| Company Handbook | Data Import                                 |                                  |
| My Details       |   |                                  |
| Reward Statement | File  | Choose File IRIS HR Employee.csv |
| Directories      | Form  | Personal 🔻 🖕                     |
| System Tools     |   |                                  |
| Recruitment      |   |                                  |
|                  | 1 line of 1 ready for import                |                                  |
|                  | ▶ 1 Employee exists, record will be updated |                                  |
|                  | A The CSV file is being processed           |                                  |
|                  |   |                                  |

**16.** You will receive confirmation that each row has imported successfully and whether it updated an existing employee record or created a new one.

| Home System Too   | ls  | Available actions          |
|---|---|----------------------------|
| Home<br>Company Handbook                                      | Data Import   | Validate Example CSV       |
| My Details<br>Reward Statement<br>Directories<br>System Tools | File<br>Form  | Choose File No file chosen |
| Recruitment   | 1 line of 1 imported  |                            |
|   | I Employee exists, record updated     The CSV file is being processed |                            |
|   |   |                            |

Please Note: The Hours per Week field only updates for new starter records created during the import process. For existing employees, any changes to their 'Hours per Week' must be manually updated in IRIS HR.

- 17. Return to System Tools | Utilities | Data | Import
- Click the Choose File option and browse to the location in which you saved the 'IRIS HR Employee Elements.csv' file from Payroll. Click Open

| Home | System Tool      | 5           | Available actions                |
|------|------------------|-------------|----------------------------------|
| 公    | Home             | Data Import | Validate Example CSV             |
|      | Company Handbook | File        | Choose File IRIS HR Employee.csv |
|      |                  | Form        | Payroll Employee Elements 🔹 🗕    |
| 8    | My Details       | Date From   | 01/11/2016                       |
|      |                  | Date To     | 30/11/2016                       |
| 23   | Reward Statement |             |                                  |

- Ensure that 'Payroll Employee Elements' is selected in the Form drop down and set the Date From and Date To fields to match the pay period for which you are importing data.
- 20. Click Validate



21. Any validation issues will be detailed on screen and must be addressed before continuing. You can identify which element record contains a validation error by checking the spread sheet for the row number given in the validation message, next to the red flag. Correct the validation issue in Payroll and then follow the steps described above to export the data from payroll and revalidate in HR.

Once you have no validation issues you are ready to import the file.

- 22. Click the Choose File option and browse to the location in which you saved the file from Payroll. Click Open
- 23. Click the **Import** option



## **Mandatory Fields**

| Field Names Mandatory fields HR to Payroll |                              | Mandatory fields Payroll to HR |
|--|------------------------------|--------------------------------|
| Code                                       | $\checkmark$                 | $\checkmark$                   |
| Sex  |                              | $\checkmark$                   |
| Forename 1                                 | ✓                            | ✓                              |
| Surname                                    | √                            | ✓                              |
| Address Lines 1, 2, 3 and 4                | ✓ (required if no NI Number) |                                |
| Post Code                                  | ✓                            |                                |
| Date of Birth                              | ✓ (required for RTI)         | $\checkmark$                   |
| Date Started                               | ✓ (required for RTI)         | $\checkmark$                   |
| Date Left                                  | ✓ (if applicable)            |                                |
| Director                                   | ✓ (if applicable)            |                                |
| Director Start Period                      | ✓ (if applicable)            |                                |
| Hours Worked Per Week                      |                              | $\checkmark$                   |
| Tax Code                                   | ✓                            |                                |
| Tax Basis                                  | ✓                            |                                |
| Pay Period                                 | $\checkmark$                 |                                |



## Where do I find more help?

Our online Support Portal has detailed help with day-to-day tasks, such as Holidays and Sickness.

To access our Support Portal:

- 1. Log into IRIS HR using the details provided in your Welcome email
- 2. From the left-hand sidebar select Guide

|      | IRIS             |                   |               |                        | IRIS<br>My D | HR Support<br>etails / Logoff |                      |
|------|------------------|-------------------|---------------|------------------------|--------------|-------------------------------|----------------------|
|      |                  |                   |               |                        |              | Absence Dashb                 | oard Profile         |
| Home | 2                |                   |               |                        |              | A                             | vailable actions 🔻 🔻 |
| ŵ    | Home             | Pending Absence » | IRIS HR Suppo | ort                    |              | My Summary                    | View All             |
|      | Company Handbook | Holiday           |               | Sickness               |              | Unauthorised                  |                      |
| 8    | My Details       | Entitlement       | 0.00          | Total Taken            | 0.00         | Total Taken                   | 0.00                 |
|      |                  | Brought Forward   | 0.00          | Occasions              | 0.00         |                               |                      |
| R    | Directories      | Total this Year   | 0.00          | Rolling Year           |              |                               |                      |
|      |                  | Taken this Year   | 0.00          | Rolling Year Occasions |              |                               |                      |
| ß    | System Tools     | Remaining         | 0.00          | Bradford Score         |              |                               |                      |
| 0    | Guide            | Request           |               |                        |              | View Group                    |                      |
|      |                  | No records found. |               |                        |              |                               |                      |

3. From the tabs at the top of the screen, select Support System

| <b>IRI</b>     | S                         | IRIS HR Support<br>Hy Details / Logaff |
|----------------|---------------------------|--|
|                |                           | Guide Support System                   |
| Home           | Guide                     |  |
| 🏠 ноте         | Guide                     |  |
| Company Ha     | andbook No records found. |  |
| A My Details   |                           |  |
| A Directories  |                           |  |
| 🏸 System Tools | ls                        |  |
| 0 Guide        |                           |  |



- **4.** In our Support Portal you can browse articles in the sections displayed. You can also search for keywords using the search bar in the upper right corner
- **5.** To suggest a product enhancement:
  - Click Submit a Request button at the top to raise a new Support ticket
  - Click **My Requests** to view all Support tickets you have raised
  - Click Home to return to the main Support Portal screen

# **IRIS**

#### Additional Software and Services Available

#### **IRIS AE Suite**<sup>™</sup>

The IRIS AE Suite<sup>™</sup> works seamlessly with all IRIS payrolls to easily manage auto enrolment. It will assess employees as part of your payroll run, deduct the necessary contributions, produce files in the right format for your pension provider<sup>\*</sup> and generate the necessary employee communications.

#### **IRIS OpenPayslips**

Instantly publish electronic payslips to a secure portal which employees can access from their mobile phone, tablet or PC. IRIS OpenPayslips cuts payslip distribution time to zero and is included as standard with the IRIS AE Suite<sup>™</sup>.

#### **IRIS Auto Enrolment Training Seminars**

Choose from a range of IRIS training seminars to ensure you understand both auto enrolment legislation and how to implement it within your IRIS software.

#### **Useful numbers**

| HMRC online service helpdesk |                          | HMRC employer helpline |                              |
|------------------------------|--------------------------|------------------------|------------------------------|
| Tel:                         | 0300 200 3600            | Tel:                   | 0300 200 3200                |
| Fax:                         | 0844 366 7828            | Tel:                   | 0300 200 3211 (new business) |
| Email:                       | helpdesk@ir-efile.gov.uk |                        |                              |

#### Contact Sales (including stationery sales)

| For IRIS Payrolls       | For Earnie Payrolls           |  |
|-------------------------|-------------------------------|--|
| Tel: 0844 815 5700      | Tel: 0844 815 5677            |  |
| Email: sales@iris.co.uk | Email: earniesales@iris.co.uk |  |

#### **Contact support**

| Your Product              | Phone         | E-mail                   |
|---------------------------|---------------|--------------------------|
| IRIS PAYE-Master          | 0844 815 5661 | payroll@iris.co.uk       |
| IRIS Payroll Business     | 0844 815 5661 | ipsupport@iris.co.uk     |
| IRIS Bureau Payroll       | 0844 815 5661 | ipsupport@iris.co.uk     |
| IRIS Payroll Professional | 0844 815 5671 | payrollpro@iris.co.uk    |
| IRIS GP Payroll           | 0844 815 5681 | gpsupport@iris.co.uk     |
| IRIS GP Accounts          | 0844 815 5681 | gpaccsupport@iris.co.uk  |
| Earnie or Earnie IQ       | 0844 815 5671 | earniesupport@iris.co.uk |



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