IRIS HR and Payroll Integration Guide

IRIS Payroll Professional

November 2016

Contents

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.
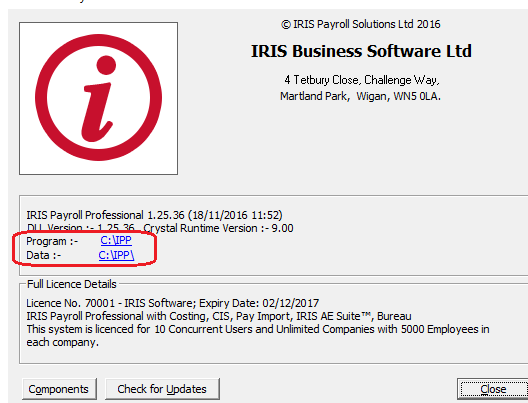
Setting up the Import and Export files

You only need to complete this setup process once.

Installing the Import and Export definitions

1. 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

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.
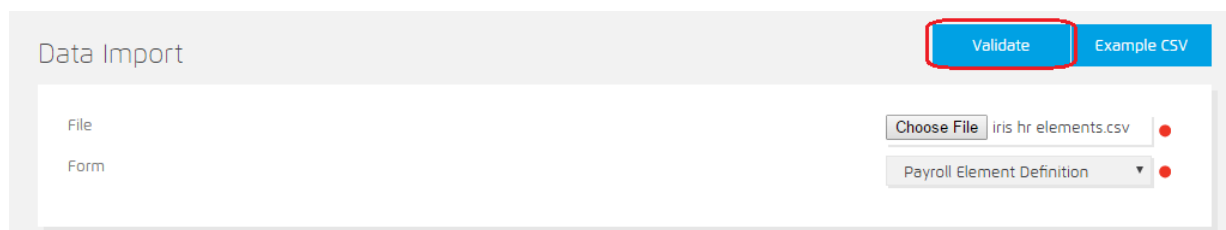
Creating the Report files

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.

4. 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**.

4. In the file explorer window, set the **File Name** to be IRIS HR Elements.csv. The file name must be **'IRIS HR Elements.csv'** and the **File Type** must be Comma Separated (CSV)

5. Log into IRIS HR using the details provided in your Welcome email

6. Select **System Tools | Utilities | Data | Import**

7. 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**

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 re-validate in HR.
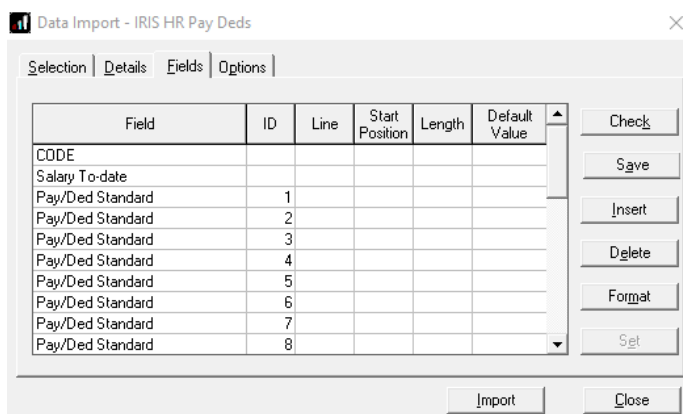
Once you have no validation issues you are ready to import the file.

9. 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'

4. 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.
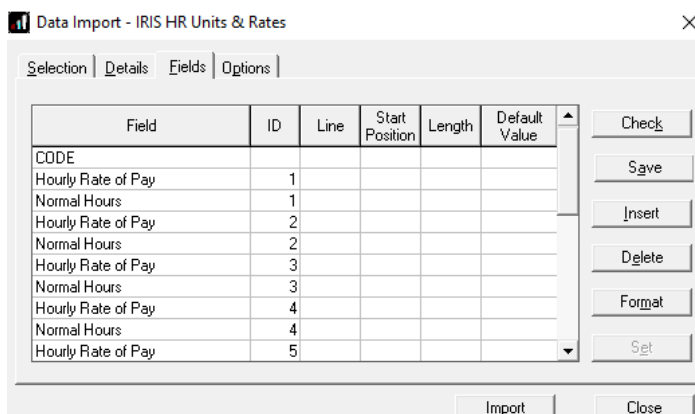

5. This should be done for all static Amount type elements in the report.

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'

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.
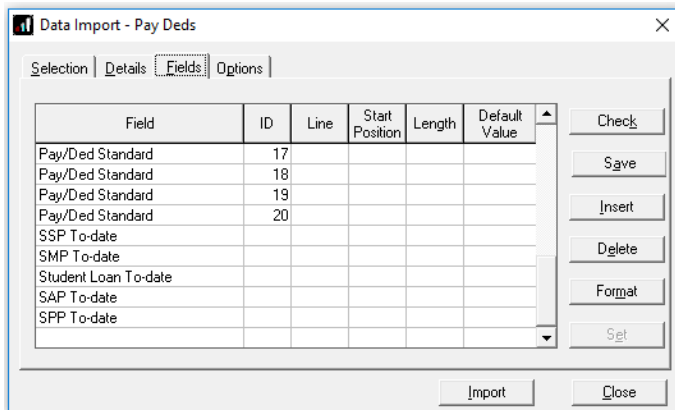
Setting up your IRIS HR

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**

4. On the **Details** tab browse to the location where you want to save the export file. The file name must be **'IRIS HR Employee.csv'** and the **File Type** must be Comma Separated (CSV)

5. Click **Export**
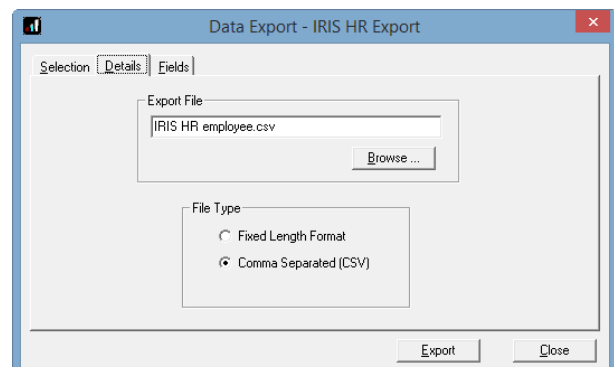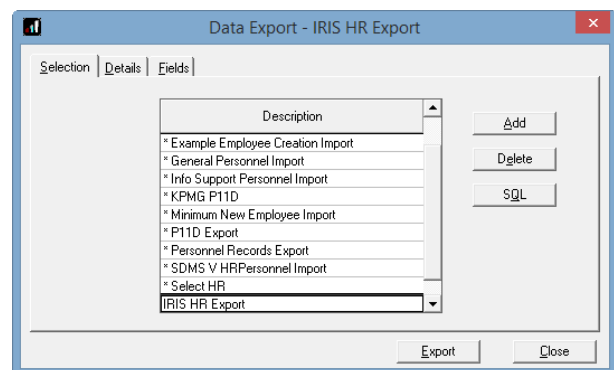
Send your employee data to us

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.
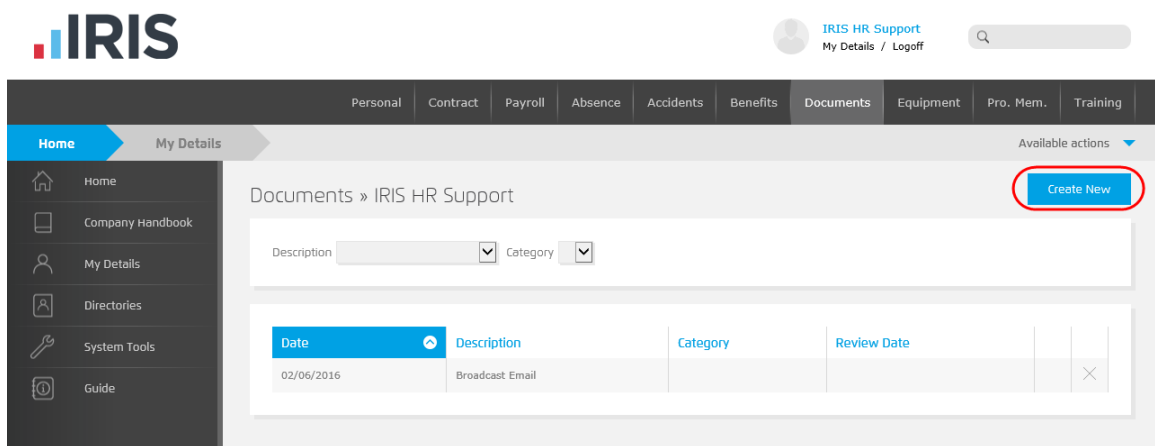
1. Log into IRIS HR using the details provided in your Welcome email

2. From the left-hand sidebar select **My Details**

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

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4. Click **Create New**

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**
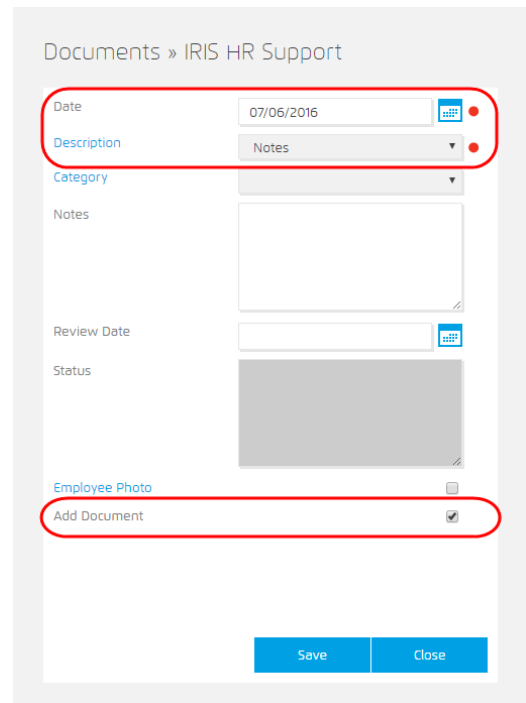
7. On the **Documents >>** file upload screen, select **Choose File**
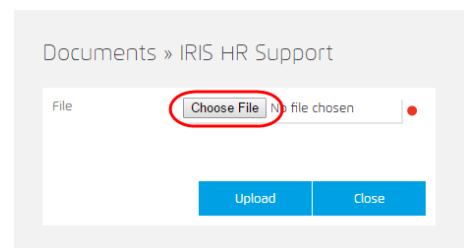
8. Browse to your payroll employees' export file. Once you have selected your export file, click **Open**

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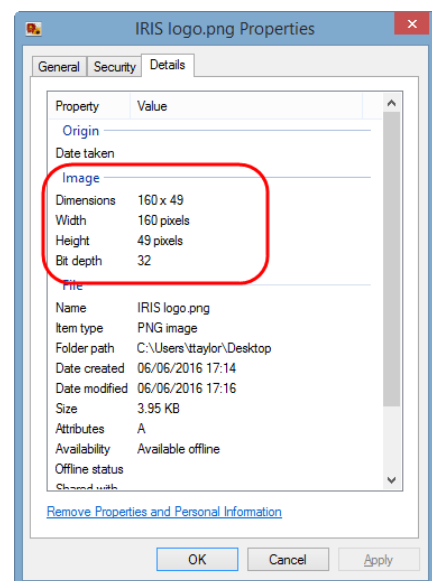
We will take your branding colours from your company's logo.

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**

4. Choose the **Pay Type**
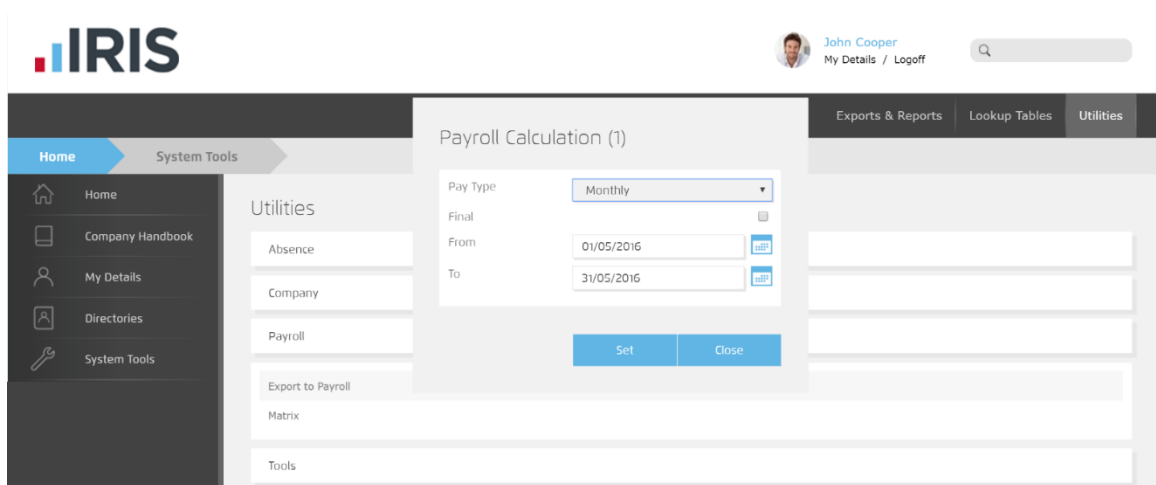
5. Enter the payroll **From** and **To** dates

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**
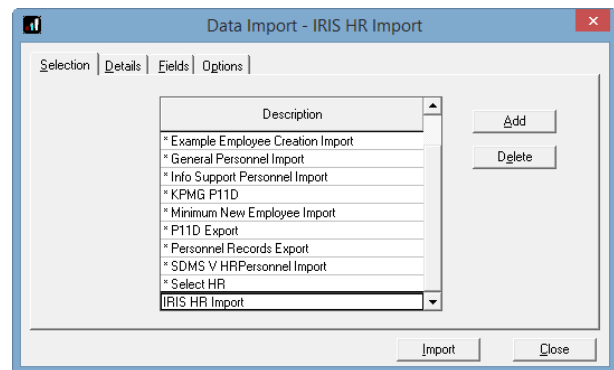
4. On the **Details** tab check the location in **Import File** is where you saved the export file from IRIS HR

5. Set **File Type** as **Comma Separated (CSV)**

This will update your employee detail information.
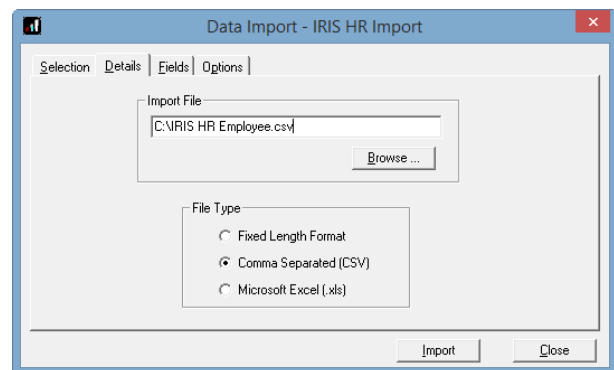
6. Click **Import**

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**
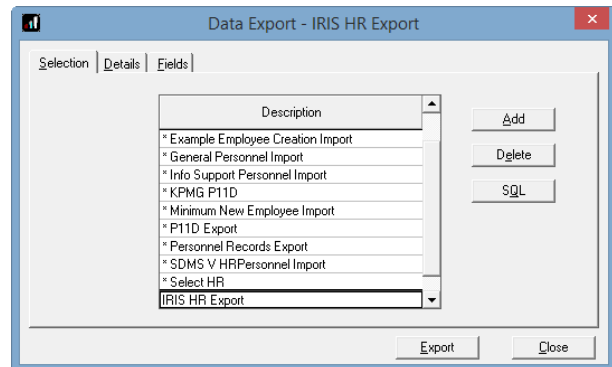
3. On the **Selection** tab choose **IRIS HR Export**

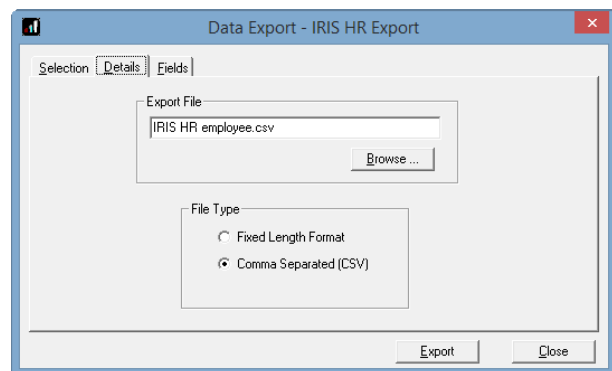4. On the **Details** tab browse to the location where you want to save the export file. The file name <u>must </u>be '**IRIS HR Employee.csv'** and the **File Type** <u>must</u> be Comma Separated (CSV)

5. Click **Export**

6. 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

8. 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**

11. Click the **Choose File** option and browse to the location in which you saved the **'IRIS HR Employee.csv'** file from Payroll. Click **Open**
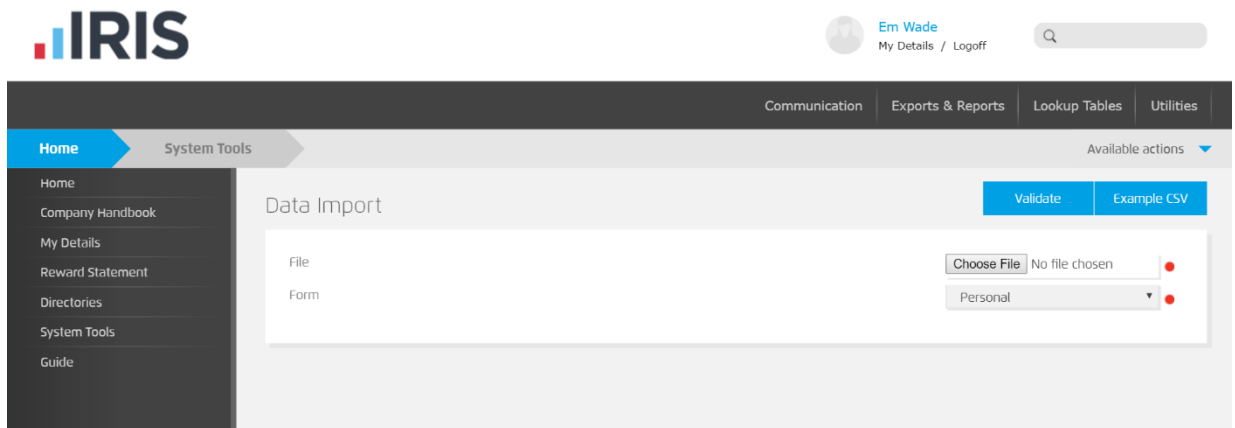
12. Ensure that 'Personal' is selected in the **Form** drop down and click **Validate**

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 re-validate in HR.
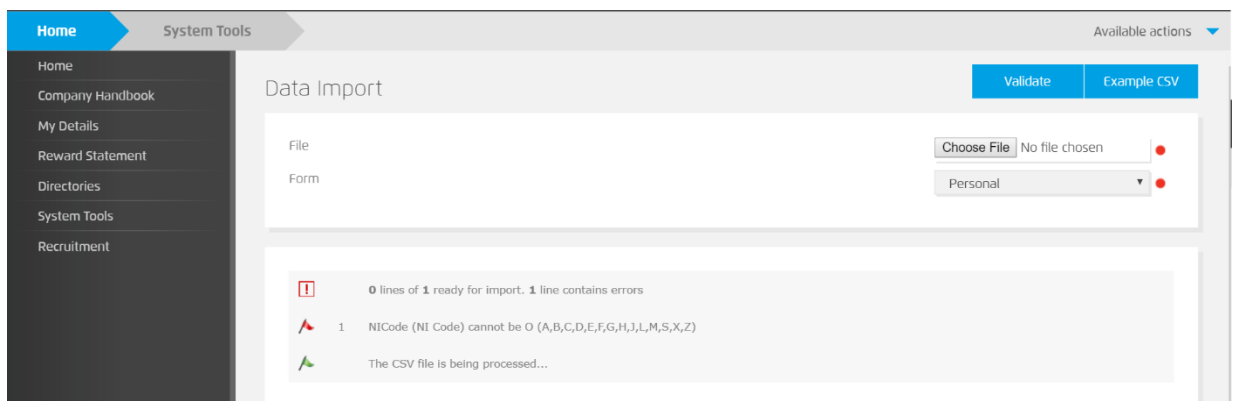
Once you have no validation issues you are ready to import the file.

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

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

> **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**

18. 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**
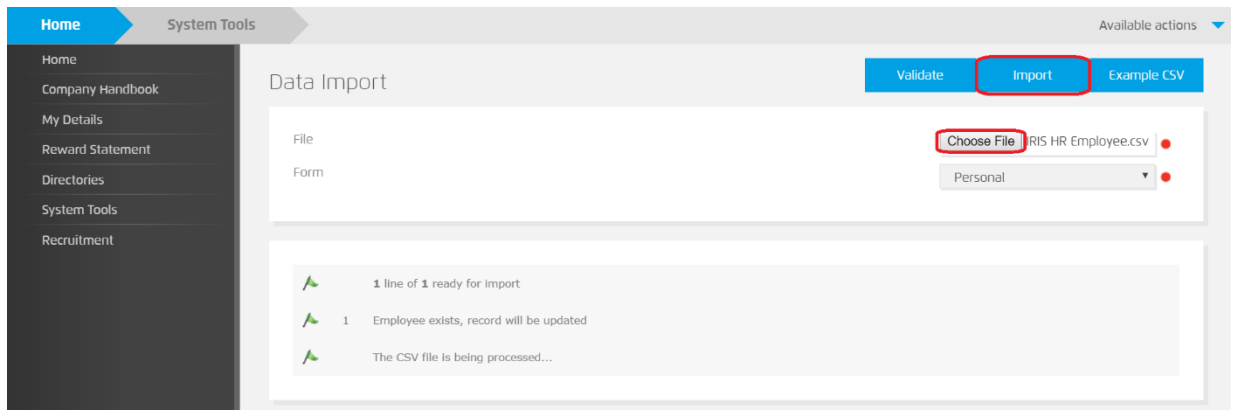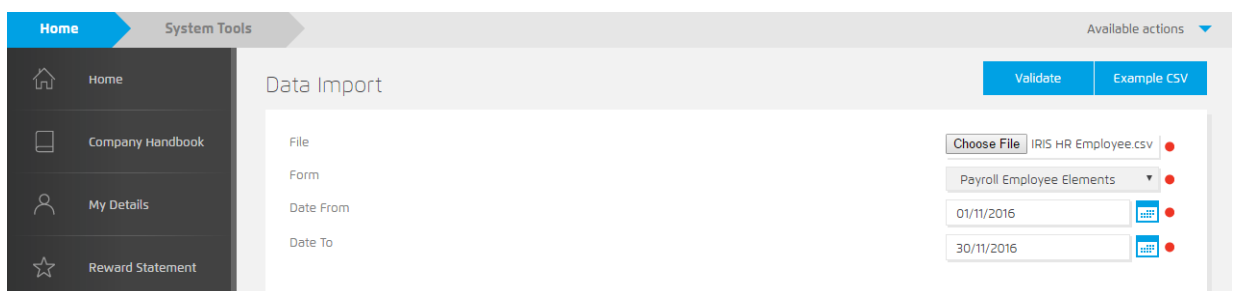

19. Ensure that 'Payroll Employee Elements' is selected in the **Form** drop down and set the **Date From** and **Date To** fields to match the pay period for which you are importing data.

20. Click **Validate**

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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 re-validate in HR.
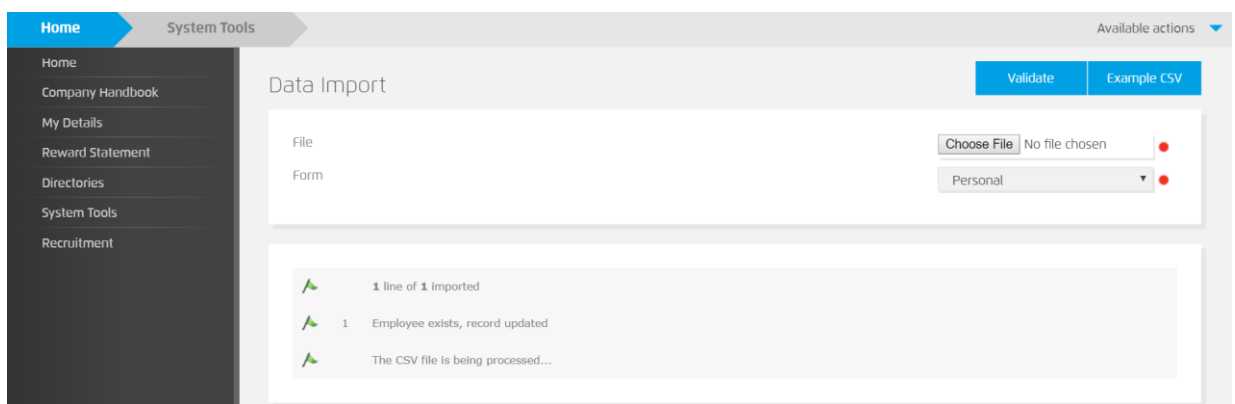
Once you have no validation issues you are ready to import the file.

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	✓	✓
Sex		✓
Forename 1	✓	✓
Surname	✓	✓
Address Lines 1, 2, 3 and 4	✓ (required if no NI Number)	
Post Code	✓	
Date of Birth	✓ (required for RTI)	✓
Date Started	✓ (required for RTI)	✓
Date Left	✓ (if applicable)	
Director	✓ (if applicable)	
Director Start Period	✓ (if applicable)	
Hours Worked Per Week		✓
Tax Code	✓	
Tax Basis	✓	
Pay Period	✓	

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**
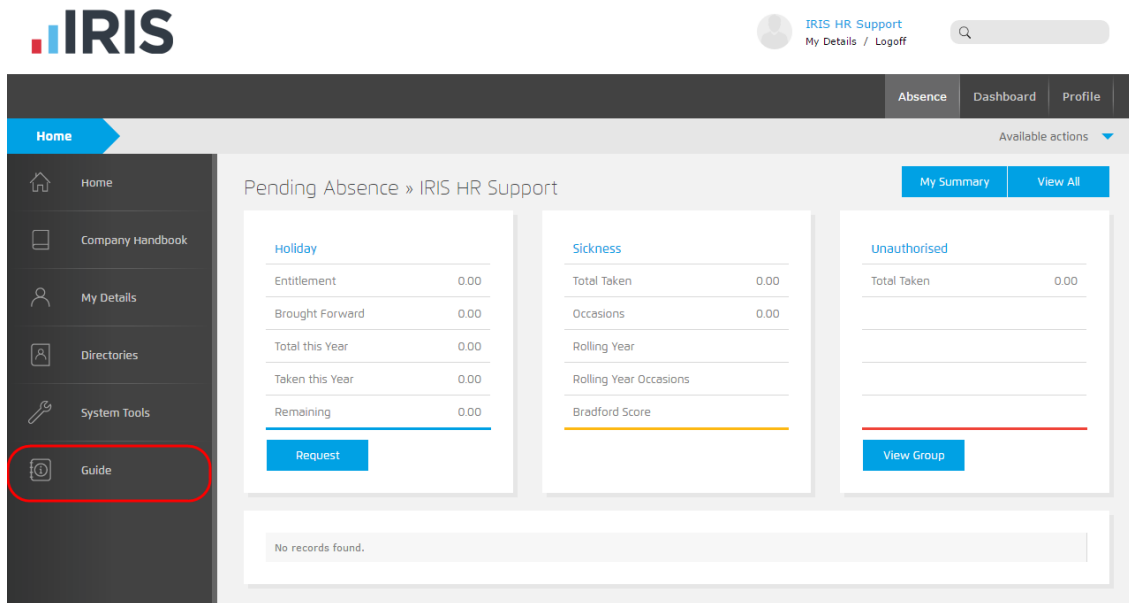
3. From the tabs at the top of the screen, select **Support System**
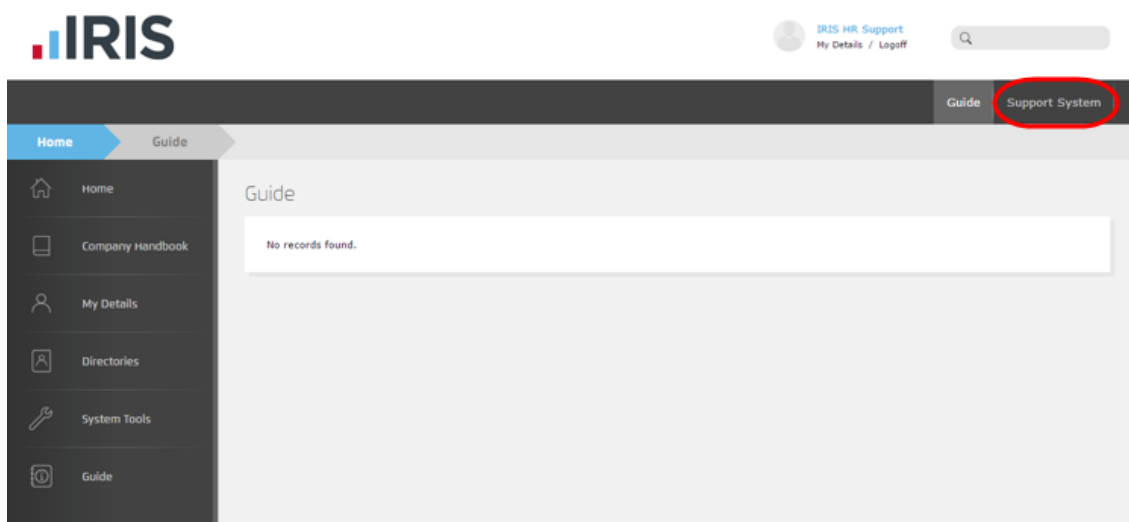
4. In our Support Portal you can browse articles in the sections displayed. You can also search for keywords using the search bar in the upper right corner

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

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Additional Software and Services Available

IRIS AE Suite™

The IRIS AE Suite™ 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* 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™.

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 Fax: 0844 366 7828 Email: helpdesk@ir-efile.gov.uk	Tel: 0300 200 3200 Tel: 0300 200 3211 (new business)

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel: 0844 815 5700 Email: sales@iris.co.uk	Tel: 0844 815 5677 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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Call: 0844 815 5700 for IRIS or 0844 815 5677 for Earnie
Visit: iris.co.uk