Guide to setting up IRIS AE Suite™ & IRIS OpenSpace online

IRIS Payroll

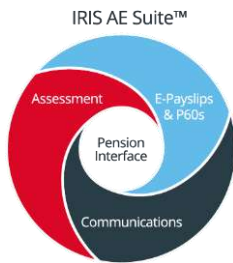April 2019

Contents

www.iris.co.uk/customer

Dear Customer,

Welcome to your guide to setting up and using the IRIS AE Suite™ and IRIS OpenSpace web portal.

IRIS AE Suite™

Assessment E-Payslips & P60s

Pension Interface

Communications

The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your payroll software), IRIS OpenEnrol and IRIS OpenPayslips/P60s/P45s. For more details on the IRIS AE Suite™ please contact Sales on **0344 815 5656**

The Guide will describe how to set up and use each function on the web and also within your payroll software.

The guide contains instructions on setting up the cloud portal for the following elements of the IRIS AE Suite™:

- **IRIS OpenEnrol**
- **IRIS OpenPayslips, P60s and P45s**

It also includes:

- **IRIS OpenSpace**

Further help can also be found on our **website**

What is IRIS OpenEnrol?

IRIS OpenEnrol is an element of the IRIS AE Suite™; a new way to distribute workplace pension communications to employees. Letters that need to be sent to employees, in order to comply with legislation, will be created automatically when you run the payroll. They will then be published to a secure online portal. The letters are emailed directly to each employee, and once they have registered with the portal, they will be able to quickly view all of their past automatic enrolment letters in an easy to access, secure area.

What will IRIS OpenEnrol do for me?

- Employees receive pension communications directly via email

- Letters can be accessed anywhere an internet connection is available

- Quick and easy to setup with no software to install

- Increases Automatic Enrolment administration efficiency

- Reduces carbon footprint demonstrating an environmentally friendly solution

- Reduces communication distribution costs including printing, postage and processing

- Fully secure

- Allows employees immediate 24/7 access to their own pension communication information

- Free IOS, Android and Windows Phone apps available for employees to securely view their own pension communications on tablets or smartphones

- Log into IRIS OpenEnrol to print any communications if an employee does not have an email address

- All published communications are date stamped for audit purposes and a copy stored against the employee record
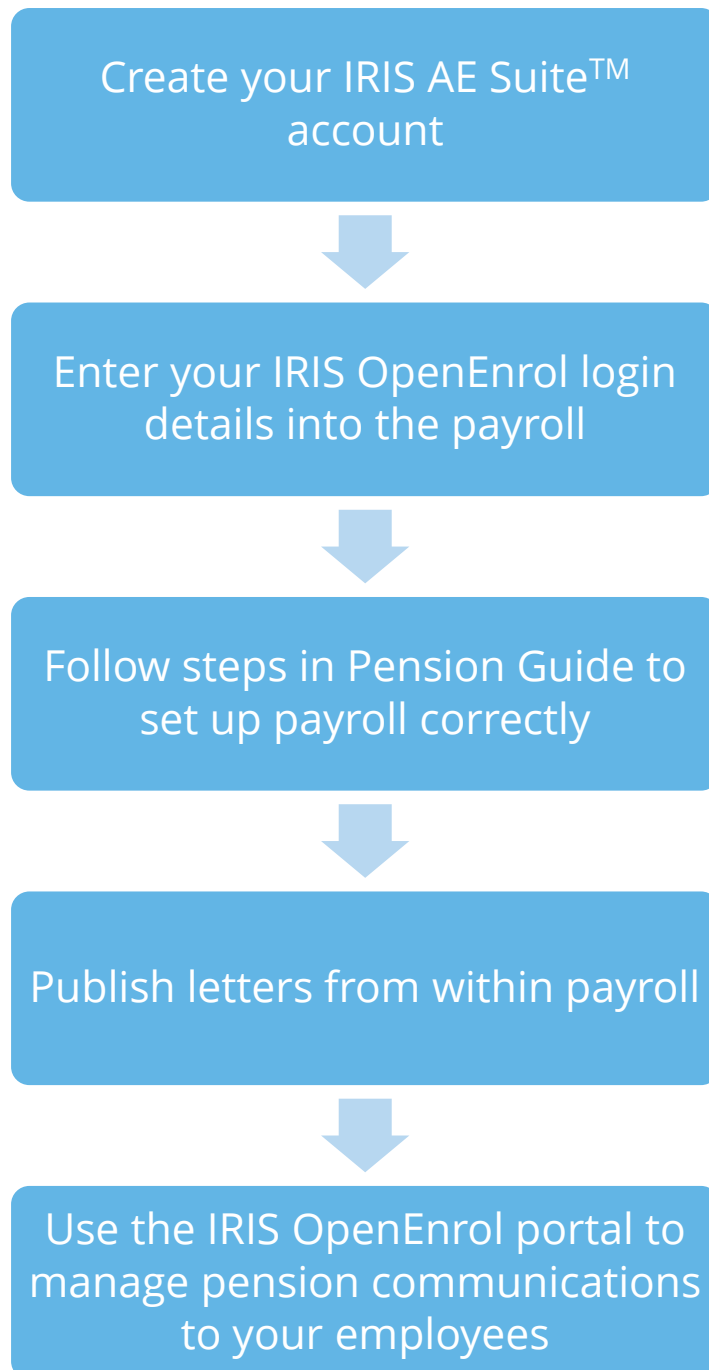
How does IRIS OpenEnrol work?

Certain Automatic Enrolment triggers during the payroll run will cause a communication to be created, which you then need to publish to the IRIS OpenEnrol secure website. IRIS OpenEnrol takes that data and creates letters in the form of Adobe PDF files to be sent to your employees.

- If the employee has an IRIS OpenEnrol account an Adobe PDF version of the letter will be emailed to the employee and stored online

- If the employee does not have an account but has an email address, they will still receive the pension communication but will also be asked if they wish to set up their online account. The letter content is in the email, meeting the TPR key requirements

- If the employee does not have an email address, log into IRIS OpenEnrol to print the required letter

When you Publish for a company for the first time, the company and employee details are created for you in IRIS OpenEnrol.

Steps to setting up and using IRIS OpenEnrol

Create your IRIS AE Suite™ account

↓

Enter your IRIS OpenEnrol login details into the payroll

↓

Follow steps in Pension Guide to set up payroll correctly

↓

Publish letters from within payroll

↓

Use the IRIS OpenEnrol portal to manage pension communications to your employees

How to create an IRIS OpenEnrol account

> If you have an IRIS OpenPayslips account you do not need to set up a new account for IRIS OpenEnrol; you can click the **Login** button and login as normal

1. Once you have signed up for the IRIS AE Suite™ you will receive an email confirming your IRIS OpenEnrol account has been created. Click on the link to confirm your Contract and Direct Debit details
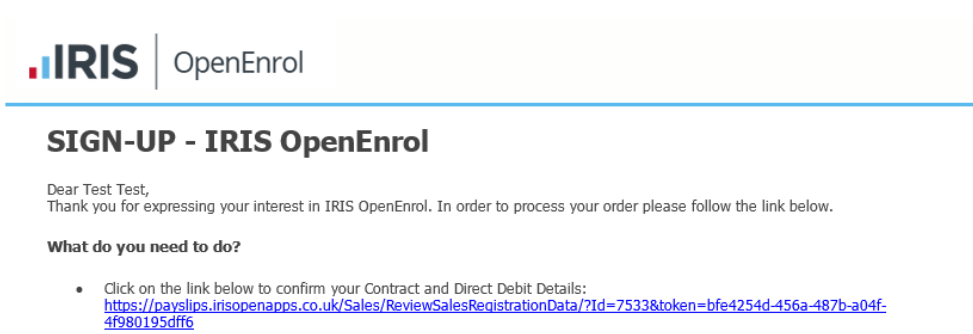
2. You will then receive an email confirming your account has been created. Click on the link in that message to complete your registration
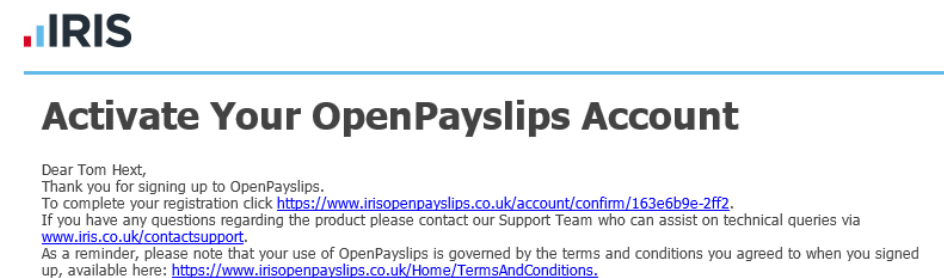
3. Enter your **New password**, **Confirm new password** and click on the **Set Password** button

4. Another email will be sent confirming those password details. You are now ready to use IRIS OpenEnrol

How to set up IRIS OpenEnrol in the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have a valid email address.

1. Log into **Admin**, click on **File | Online Login Details | OpenEnrol/OpenPayslips Login Details**

2. Enter the username and password registered on the portal and click **OK**

3. Log back into the payroll software. If you need to you can set different login details for each company on **Company | Alter Company Details |Open IDs**

4. Make sure all employees have an up-to-date, valid email address within **Employee Details**

For IRIS OpenEnrol to operate correctly it is vital for certain information to be present. Instructions on what else you must do can be found in the Pension Guide, which you can access via the Pension menu in your payroll software

The Pension Guide also details how the letters are created and how to publish them

How to administer your employees' pension communications using IRIS OpenEnrol

1. Visit the IRIS OpenEnrol website at **https://www.irisopenpayslips.co.uk/** and click the **Login** button

2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **User name** is the **Email Address** you used. Click the **Login** button

   NOTE: To receive a password reminder simply click the **Forgot your password?** link
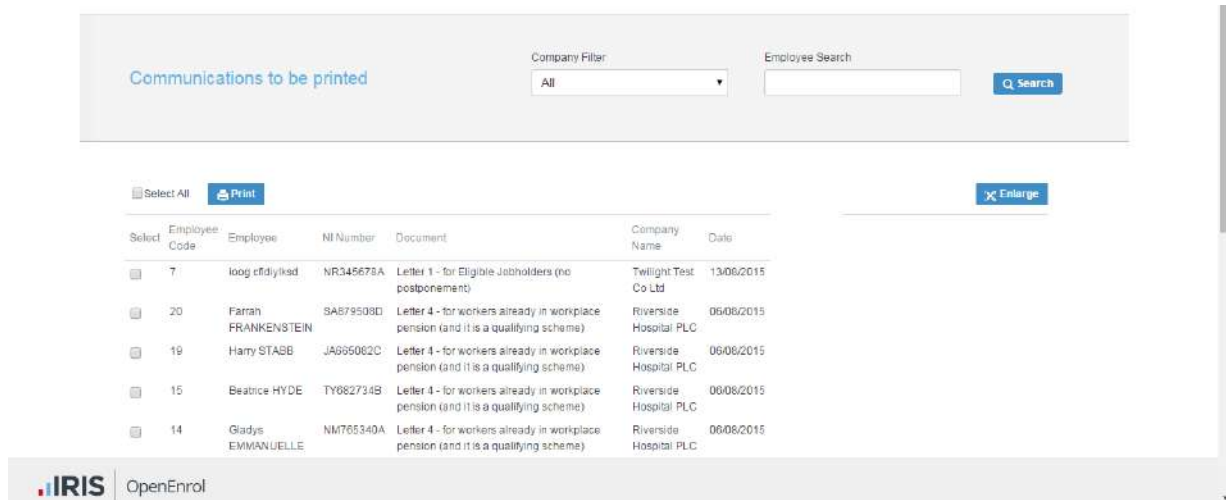
The first screen you see on logging in is the **Employees** tab. (If you do not have OpenPayslips this screen is read-only). This is a summary of what's happened recently within the company.

3. Click on the **OpenEnrol** tab
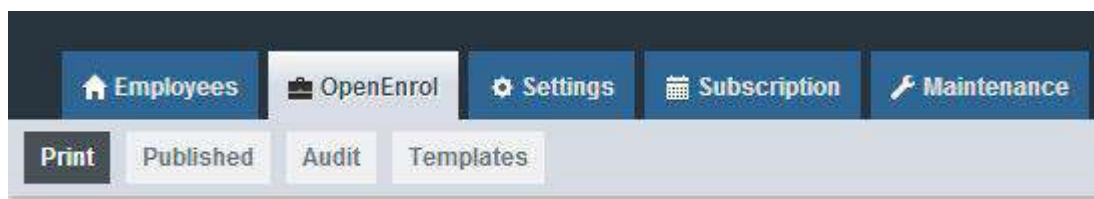
The **OpenEnrol** tab has four views, **Print**, **Published, Audit** and **Templates**. It opens by default on the **Print** view.

Print

Ideally your employees will have email addresses set up within the payroll software so that when you click the **Publish** button the pension communications will be sent automatically via email to those employees. They will also be able to set up their own IRIS OpenEnrol accounts, and access their own communications via the portal.
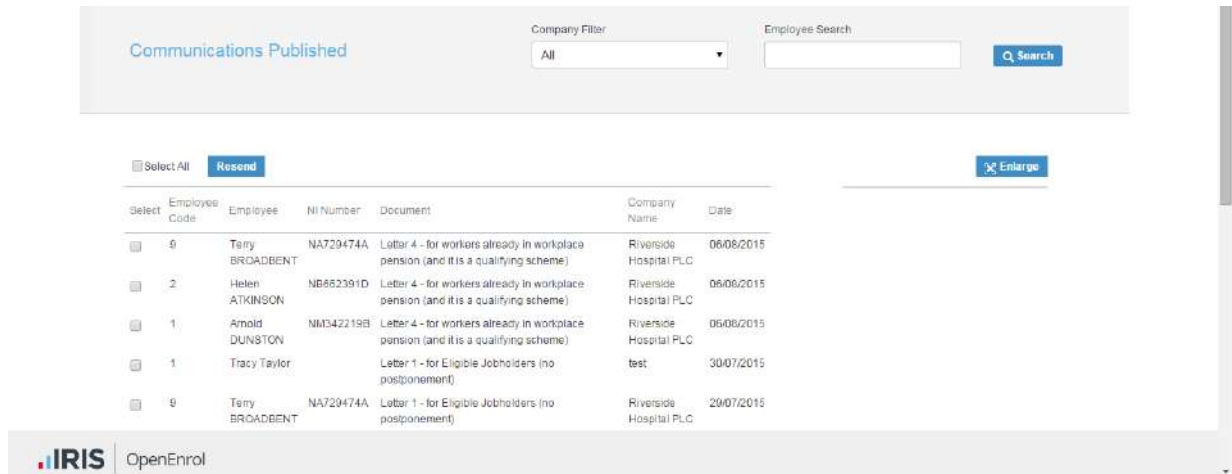
However, there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication for audit purposes.

1. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals

2. Click the **Select All** box or tick the boxes to select particular letters. Then click the **Print** button

Published

You may need to resend emails or merely see what communications have been sent. To do this:

1. Click the **Published** button to open the **Published** view
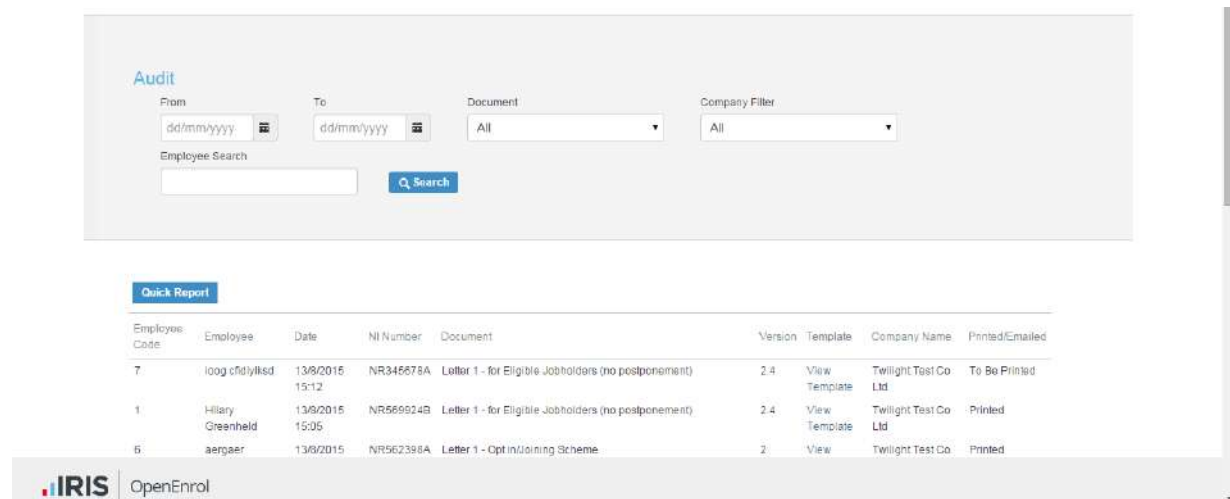

You are able to view a list of all the emailed communications, as well as resend the emails if necessary, from this screen

2. Use the **Company Filter** to view results by company, and **Employee Search** to find particular individuals

3. Click the **Select All** box, or tick the boxes to select particular letters. Then click the **Resend** button to resend the emails previously sent through the payroll software

Audit

The **Audit** section is primarily for the Pensions Regulator, so you can provide evidence that you are meeting your legal obligations regarding pension communications.

1. Use the filters **From**, **To**, **Document**, **Company Filter** and **Employee Search** to narrow the list of entries as required

2. Click the **Quick Report** button to download a PDF version of the data on your screen

Templates

Finally, you can view the various **Templates** that are in use to create the letters, see what the current versions are and edit them in order to add your own logo and signature.

1. Click on the **Templates** button to open the **Templates** view

2. In the **View** column, click on the **View Template** link next to the template you are interested in

3. The screen will change to the **Edit Template** view. This will show the changes that have been made to that particular template, and when they were made
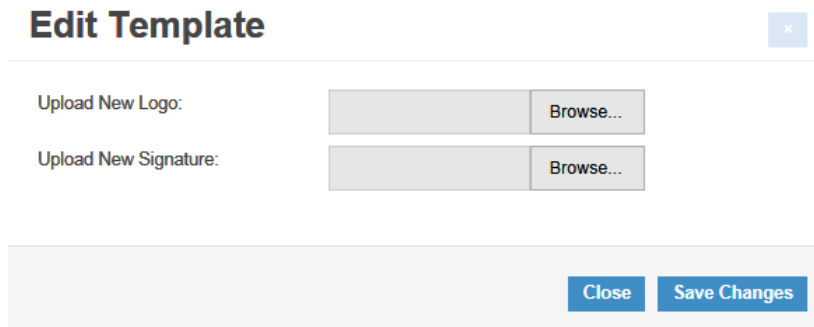
To add your logo to the template:

1. Click the **Edit Logo** button

Edit Template

Upload New Logo:		Browse...
Upload New Signature:		Browse...

Close   Save Changes

(This screen may look slightly different if using a browser other than Internet Explorer)

2. Click the **Browse** button next to **Upload New Logo** then browse for your logo on your system and click **Open**

3. Click **Save Changes** and your amended template will appear in the list as the latest version. Click the **View Template** link to view a PDF of your amended template

What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips, P60s and P45s to employees. Payslips, P60s and P45s are published from within the payroll software to a secure online payslip portal. Once employees have registered with the portal, they are able to quickly view all of their current and historic payslips, P60s and/or P45s in an easy to access, secure area.

- All payslip/P60/P45 information is taken directly from the payroll software and displayed exactly how they are usually seen

- Payslips/P60s/P45s can be accessed anywhere an internet connection is available

- Quick and easy to setup with no software to install

- Increases payroll processing efficiency

- Reduces carbon footprint demonstrating an environmentally friendly solution

- Reduces payslip/P60/P45 distribution costs including printing, postage and processing

- Fully secure

- Allows employees immediate 24/7 access to their own pay information

- Easy access to historical pay information for both employer and employee

- Free IOS, Windows phone and Android apps available for employees to securely view their own payslips/P60s/P45s on tablets or smartphones

IRIS

Steps to setting up and using IRIS OpenPayslips

Visit IRIS OpenPayslips
website and Create Account

↓

Update payroll software
with Account details

↓

Check employee email
addresses

↓

Publish payslips, P60s
and/or P45s
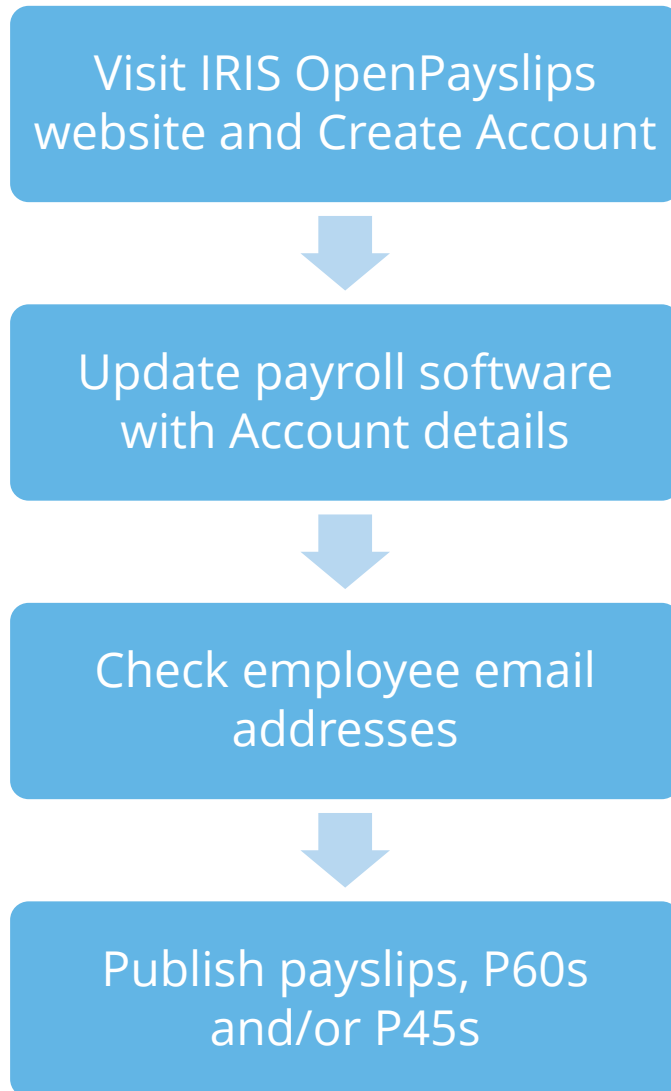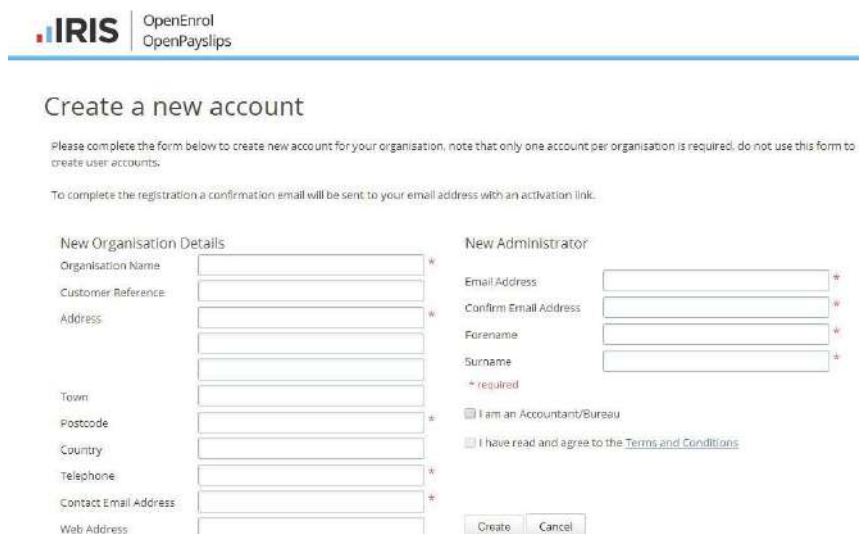
How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website **here**

2. Click **Try Now** to open the following screen:

3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator - Email Address**

4. Click the link in the email to be taken back to the IRIS OpenPayslips website

5. Enter a **Password** and click **Set Password**
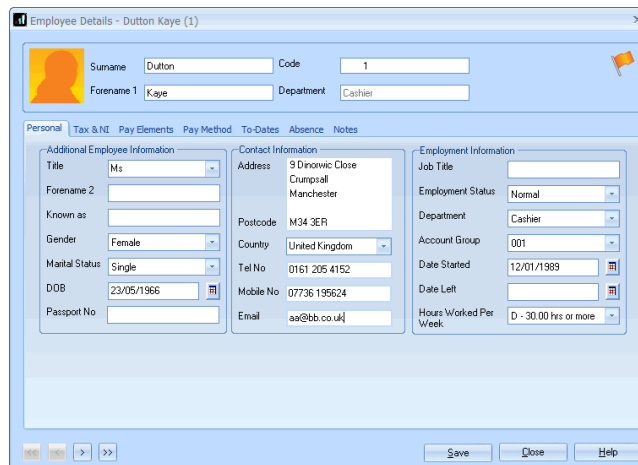
How to update the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software and all employees must have valid email addresses.

1. Log into **Admin**, click on **File | Online Login Details |OpenEnrol/Open Payslips Login Details**

2. Enter the **Username** and **Password** registered on the IRIS OpenPayslips website and click **OK**

3. Log back into the payroll software. If you need to you can set different login details for each company on **Company | Alter Company Details |Open IDs**

4. Make sure all employees have up-to-date, valid email addresses within **Employee Details**

How to publish payslips/P60s/P45s to the IRIS OpenPayslips portal

Payslips

1. Select the **Pay Frequency** then go to **Reports | Print Payslips**

2. If necessary change the period you wish to publish for and click **Refresh**

3. Click the **Publish** button in the OpenPayslips section of the ribbon

4. If some employees do not have an email address, tick **Print Unpublished Payslips** to the right of the screen and click **Refresh** at the top of the screen. The preview window will now only display and print for employees without an email address

5. All employees paid in the selected pay period with an email address will be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip
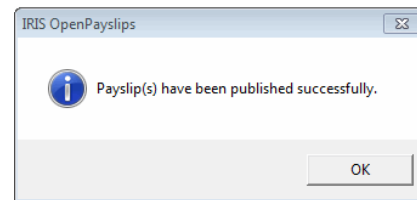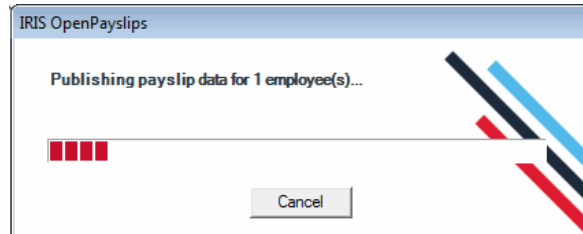
P60s

1. From **Reports | Report Manager | Year-end**, add the **E-P60** to the **Selected Reports** (this only needs to be done once)

2. Select the **Pay Frequency** then go to **Reports | Year-end Reports**

3. Select the **E-P60**

4. Click the **Publish** button in the OpenPayslips section of the ribbon
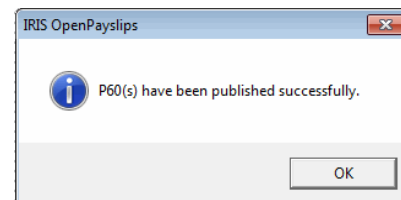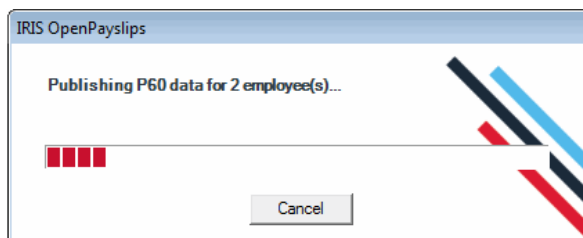
5. All current employees paid in the tax year with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their P60

6. If you then want to print the P60s for employees with no email address, at the top of the screen, from the **Print Filter** section, select **Employees with no email address**. Click **Refresh**, and the preview screen will only include employees without email addresses

P45s

1. Select the **Employee** on the sidebar

2. From the ribbon, choose **P45 Leaver**

3. Enter the **Leaving Date** and click **Print**

4. The P45 will preview to screen, click **Publish** from the ribbon

5. If the employee has an email address in their record, an email will then be sent asking them to register with the IRIS OpenPayslips website to view/print their P45
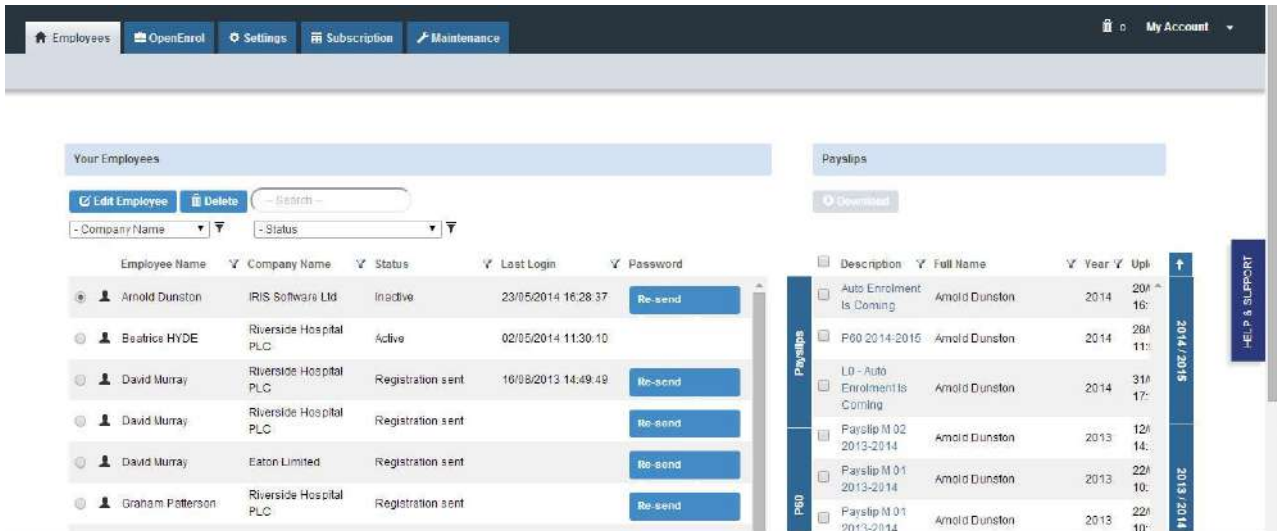
How the employer views the published payslips/P60/P45

To view the published payslips/P60/P45:

1. Go to the IRIS OpenPayslips website at **https://www.irisopenpayslips.co.uk/** and log in with the registered email address and password

2. Click on an employee's name and the screen will change on the right to show only their communications

3. Select the tax year on the right that you wish to look at, then click on either the **Payslips** tab, **P60** tab or **P45** tab. The screen will change again to show the payslips/P60s/P45s uploaded for the employee in that tax year

4. Click on the Payslip, P60 or P45 and a new browser tab will open containing a copy to be viewed or printed as needed

5. Click back to the first browser tab to return to IRIS OpenPayslips

Managing the IRIS OpenEnrol & IRIS OpenPayslips Account

The main page has five tabs on the top left, **Employees, OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (**IRIS OpenEnrol** is detailed earlier in this guide)

Employees

The **Employees** tab displays all employees from all companies in the payroll software that have had payslips/P60s/P45s published to IRIS OpenPayslips, along with their current **Status.**

The list of employees can be sorted using any of the columns; **Status** shows whether a registration email has been sent and whether the employee has registered with IRIS OpenPayslips yet.

How to edit an employee's details

1. On the **Employees** tab select the individual using the buttons on the left, then click **Edit Employee**

2. Amend details, then click **Update**

> If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s/P45s

IRIS OpenEnrol

IRIS OpenEnrol is an element of the IRIS AE Suite™ detailed earlier in this guide

Settings

The **Settings** tab has two buttons on the top left, **Account Details** and **Report**.
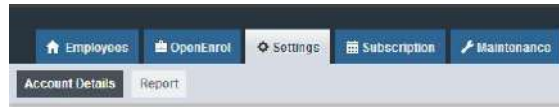
When the **Settings** tab is selected it opens by default on the **Account Details** view.

- **Account Details** shows the account administrator details. These can be updated by clicking the **Edit** button

- From the **Report** button you can:

    o Use the **Audit Log Report** to view a list of all actions taken within this account. Use the **Search** box to filter the results if required

    o View **Published Payslips History** to create a report showing the number of files uploaded per payroll company. Enter the relevant dates and click either **Data Export (.CSV)** or **Print View**

    o View **Changed Employee Emails** showing previous email addresses and what they have changed to

Subscription

The **Subscription** tab has two sections, **Contract** and **Invoice History**.

- **Contract** displays your **Start Date** and **End Date** and other useful information
- Click on **Invoice History** to view, print or export invoices

Maintenance

The **Maintenance** tab allows you to recall documents that have been sent in error. You can recall **Payslips, P60s, P45s** and **Pensions** information by clicking on the relevant button at the top of the screen.

To recall a document:

1. Tick the box next to the relevant document or click the **Select All** box if you need to recall everything
2. Click the **Recall** button

This will remove the published document from the website, **it will not recall the actual sent email** (which in the case of Pensions includes a copy of the letter). If the employee tries to click on the link to the payslip/P60/P45 in the email, it will not work.

What is IRIS OpenSpace?

The IRIS OpenSpace is a cloud solution allowing you to share documents with your clients. You are able to publish payroll reports to the IRIS OpenSpace online portal and your clients are then able to log into IRIS OpenSpace to view and/or approve the reports.

IRIS OpenSpace can incorporate your branding, colours and logos both online and in all communications; this provides a fully branded portal to your clients where they can safely and securely exchange their confidential information with you.
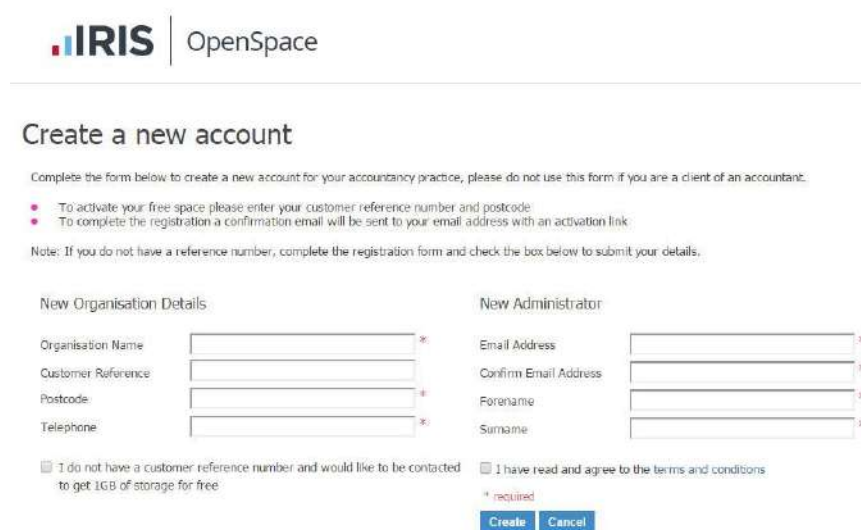
- Upload, store and approve documents online

- Reports can be accessed anywhere an internet connection is available

- Quick and easy to setup with no software to install

- Increases efficiency

- Reduces carbon footprint demonstrating an environmentally friendly solution

- Reduces distribution costs including printing, postage and processing

- Fully secure – only you and your client can view documents

- Allows clients immediate 24/7 access to report information

- Claim 1GB storage free (by entering your Customer Reference – contact Sales/Support for this)

- Easy access to E-Approvals and E-Checklist

How to create an IRIS OpenSpace account

1. Visit the IRIS OpenSpace website **here**

2. Click **Try Now** to open the following screen:

3. Enter the required details. Make sure you enter your Customer Reference to claim your 1GB of free storage

4. Click **Create**. An activation email will be sent to the **New Administrator - Email Address**

5. Click the link in the email to be taken back to the IRIS OpenSpace website

6. Enter a **Password** and click **Set Password**

How to update the payroll software

The **New Administrator - Email Address** needs to be added to the payroll software along with the relevant Client selected in **Company Details**.

1. Log into **Admin**, click on **File | Online Login Details | OpenSpace Login Details**

2. Enter the **Username** and **Password** registered on the IRIS OpenSpace website and click **OK**

3. Log back into the payroll and on **Company | Company Details | OpenSpace**, click **Refresh** to populate the **Client Name** dropdown with the available clients in IRIS OpenSpace account. The **Client Name** list is in **Client ID** order

4. Select the Client from the **Client Name** dropdown; this will automatically populate the **Client ID** with the Client ID configured in the IRIS OpenSpace Account then click **OK**

> It is important to ensure that the correct Client ID/Client Name is entered to prevent potentially publishing to the wrong client

How to publish reports to the IRIS OpenSpace portal

Reports

1. Print the required report to screen

2. If necessary change the period you wish to publish for and click **Refresh**

3. Click the IRIS OpenSpace **Publish** button at the top right of the screen
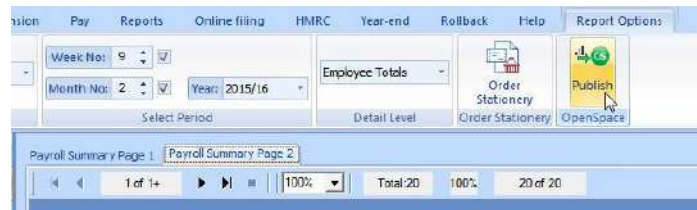
4. From the **Publish to OpenSpace – Request E-Approval** screen, select the required settings

5. Tick **Send email Notification** if you want an email notification to be sent to your client. This will be sent if they have **Receive Notifications** ticked in the client setup of IRIS OpenSpace

6. By default, **Generic approval** will be selected and displays the following text:

   "[Client] confirms that the information is correct and complete to the best of their knowledge and belief."

   If you want to customise the text, select **Custom Approval** and enter the required text – a maximum of 300 characters over 3 lines

7. To request electronic approval from your client, tick **Client has given consent to electronically approve their documents**

8. Select specific users to request approvals from by clicking **All Users** or the **Select Users** button

9. If you do not require approval for the documents, click **Skip**. The document will then not include a request for approval

10. Click **Publish Document** to publish to IRIS OpenSpace. The report will be published in pdf format

How to view the published documents

To view the published documents:

1. Go to the IRIS OpenSpace website at **https://www.irisopenspace.co.uk/Account/LogOn** and log in with the registered email address and password

2. From the **Dashboard**, choose from:

   ■ Files – Unread Files Received

   ■ E-Approvals – Awaiting Approval; Approved or Rejected

   ■ E-Checklist – Not Started; In Progress or Finalised*

   ▪ *The E-Checklist is only used by IRIS Personal Tax software – for further details click **here**

3. Click on the relevant **Filename / File description**, this will download the document for you to view

Managing the IRIS OpenSpace Account

The main page has three tabs on the top left, **Home**, **Settings** and **Subscription**.
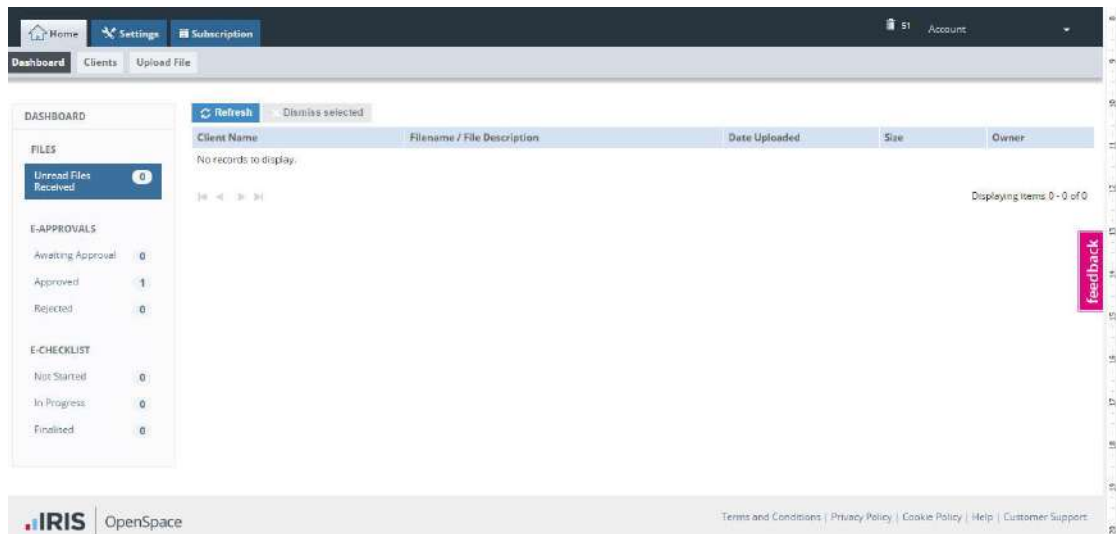
Home

The **Home** tab has three views - **Dashboard**, **Clients** and **Upload File**

Dashboard

The **Dashboard** view displays all documentation for all clients in the payroll software that have had documentation published to IRIS OpenSpace, along with the current status. The documentation is broken down into three sections:

- Files – Unread Files Received

- E-Approvals – Awaiting Approval; Approved or Rejected

- E-Checklist – Not Started; In Progress or Finalised*

    *The E-Checklist is only used by IRIS Personal Tax software – for further details click **here**

Clients

From the **Clients** tab you can:

- Click **+ New Client** to add a new Client

- Upload a file to all clients

- Search for a client by **Client Name** or **Client ID**

- Check a Client's **Status** for instance, **Not Registered** or **Active**

- Edit **Client** – allows you to add a client user, delete a client user, resend activation request, edit client user email address

Click on the relevant **Client Name** - this will take you to the **Files** view and display current documents together with information such as the date **Uploaded**, the **e-Approval** status, file **Size** and **Owner**

Files

1. To view a document, click on the **Name**, this will either open a folder containing documents or download the document for you to view

2. To upload a new document and send an email notification to the client, click **Upload File**, tick **Send email notification** and **Browse....** for the required report

3. For ease of administration, you can setup folders to store documentation – perhaps a folder for payslips. To add a folder, click **New Folder**. Tick the selection box next to the new folder and click **Edit**, here you can amend the folder name and add a description if required

4. To move a document to a folder, tick the selection box and then click **Move To**, select the folder you require and select **Move**. You can select multiple documents

5. To copy a document to a folder, tick the selection box and then click **Copy To**, select the folder you require and select **Copy**. You can select multiple documents

e-Approval

This view shows all the documents for the relevant Client, along with their current **Status** regarding e-Approval, for instance if approval has been requested or if the document has been approved and who it has been approved by.

e-Checklist

e-Checklists are a great way to collate tax information electronically for your clients. They eradicate the cost of producing and posting paper checklists, whilst negating data entry overhead and errors.

This valuable integration, offered by IRIS Personal Tax – part of the IRIS Accountancy Suite and IRIS OpenSpace, means that you receive the client tax data you need, when you need it. Click **here** for further information.

Settings

The **Settings** tab has 6 tabs, **Users**, **Practice Details**, **Customisation**, **Audit Log**, **e-Approval Logs** and **e-Checklist Logs**.

When the **Settings** tab is selected it opens by default on the **Users** view.

- **Users** shows the account administrator details. These can be updated by clicking the **Edit Staff** button

Users

From the **Users** tab you can:

- View or Edit Staff

- Add new users

- Import users

- Delete users

Practice Details

From the **Practice Details** button, you can:

- Edit the Practice details

- Add/Edit or Delete your Default Folder Structure

- Apply amendments to your Default File Sort Order, choose from:

    o Uploaded time/date, most recent first

    o Latest Downloaded time/date, most recent first

    o Electronic approval status, required first

    o Alphabetically, ascending by name

    o Alphabetically, ascending by description

Customisation

Here there are various options enabling you to build your own, personalised, client portal. Click **here** for further details.

Audit Log

Here you can view and download actions carried out in IRIS OpenSpace such as:

- User Logged In

- User Logged Out

- File Deleted

- File Downloaded by User

- File Uploaded

This screen displays the **Date**, **User**, **Action**, **Client ID** and **Data**.

e-Approval Logs

From this tab you can view documents for the relevant Client, the **Status**, for instance if approval has been requested or if the document has been approved and who it has been approved by.
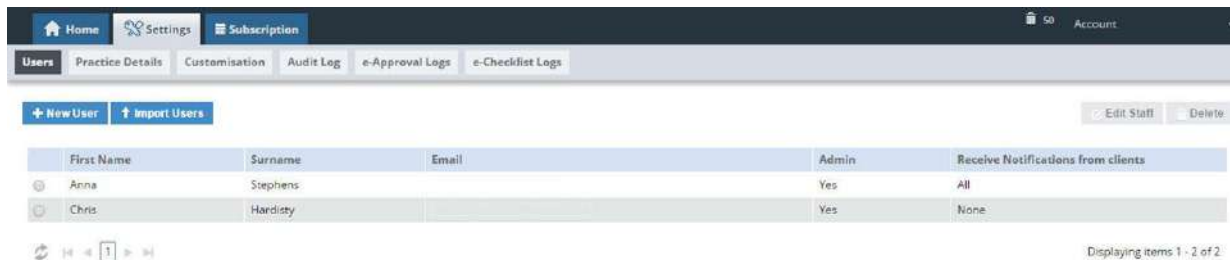
View here the log of e-Checklists, displaying the **Client ID**, **User**, **Name**, **Description** and date **Last Updated**.

Subscription

The **Subscription** tab has two sections, **Your Subscription** and **Invoice History**.

- The **Your Subscription** section displays your **Status**, **Subscription Id**, **Subscription Cost**, **Created Date** and **IRIS Free Space**. You can update your **Subscription** here by purchasing additional storage, which you will be billed automatically for each month until you cancel it from this screen

- Click on **Invoice History** to view, print or export invoices. Links to the invoices are sent automatically after each monthly payment is taken

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	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: 0344 815 5700	Tel: 0344 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0344 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0344 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0344 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0344 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0344 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0344 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0344 815 5671	earniesupport@iris.co.uk