



Guide to setting up IRIS AE Suite™ online

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Dear Customer

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



The IRIS AE Suite™ consists of several elements, including Auto enrolment (within your payroll software), IRIS OpenEnrol and IRIS OpenPayslips/P60s. For more details on the IRIS AE Suite™ please contact Sales on **0844 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 and P60s**

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?

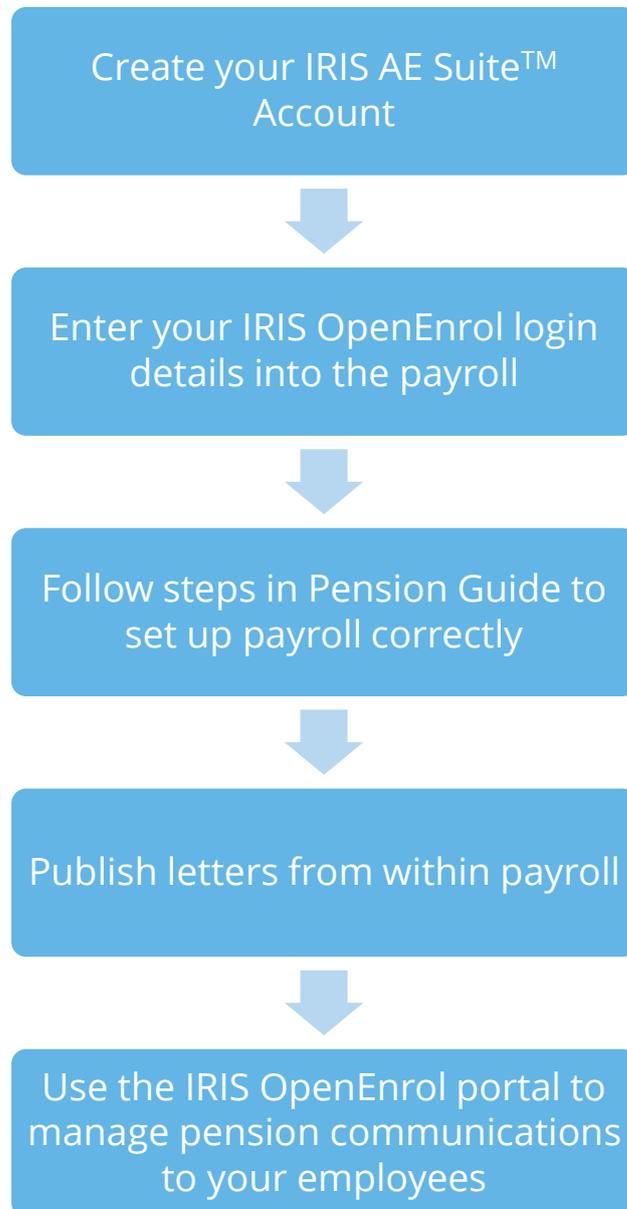
- Employees receive pension communications directly via email
- Letters can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases Automatic Enrolment administration efficiency
- Reduces carbon footprint demonstrating an environmentally 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 and 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

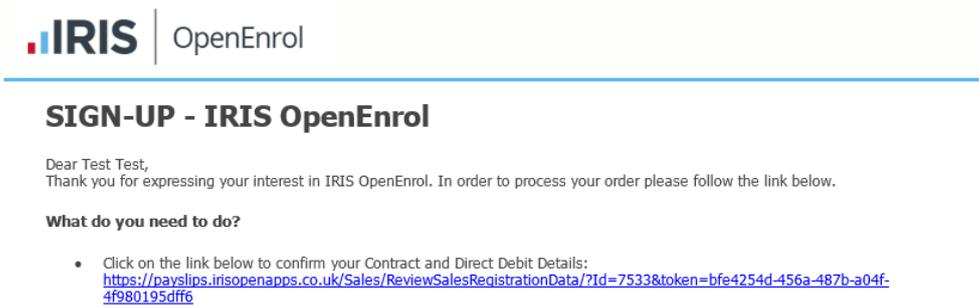
Steps to setting up and using IRIS OpenEnrol



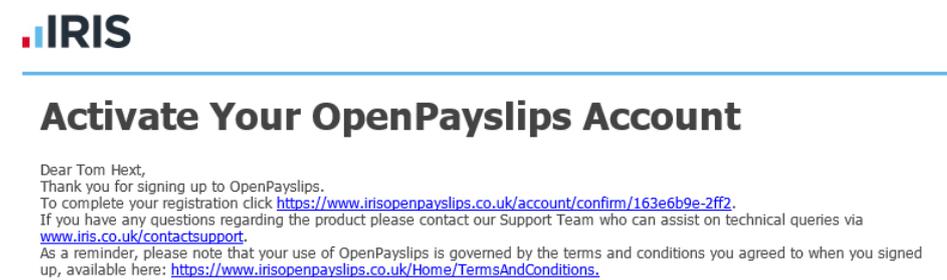
How to create an IRIS OpenEnrol account

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



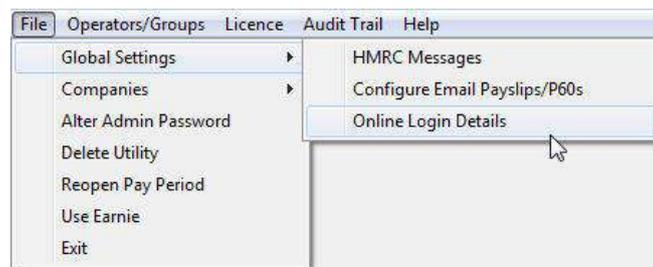
3. Enter your **New password**, **Confirm new password** and click on the **Set Password** button

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

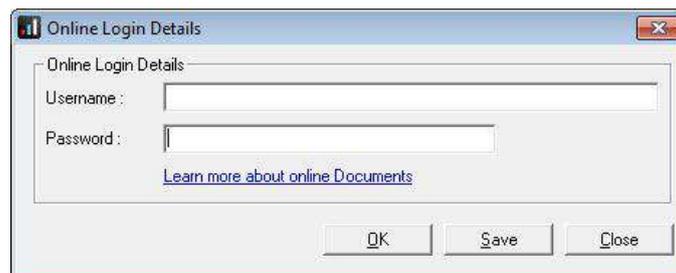
How to set up IRIS OpenEnrol in the payroll software

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 | Global Settings | Online Login Details**



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



3. Log back into the payroll. If you need to, you can set different login details for each company on the **Company | Alter Company Details | IRIS Credentials** tab
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



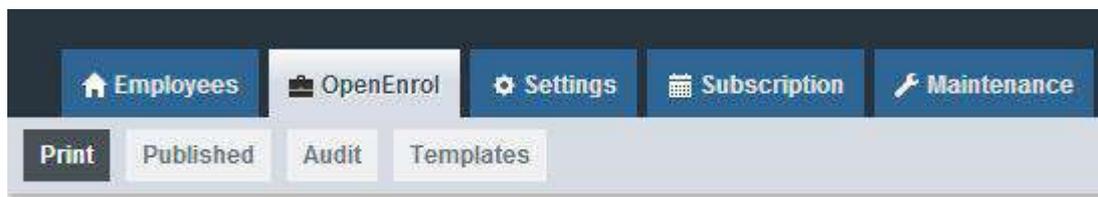
The image shows the login page for IRIS OpenEnrol. At the top left is the IRIS logo. To its right, the text 'OpenEnrol' and 'OpenPayslips' is displayed. Below this, there are two input fields: 'Username' and 'Password', both highlighted in yellow. Under the password field, there is a checkbox labeled 'Remember me?' and a blue link that says 'Forgot your password?'. At the bottom of the form, there are two buttons: 'Login' and 'Cancel'.

2. Enter here the login details you entered when you created the IRIS OpenEnrol account. **Username** is the email address you used. Click the **Login** button

NOTE: To receive a password reminder simply click the '**Forgot your password?**' link

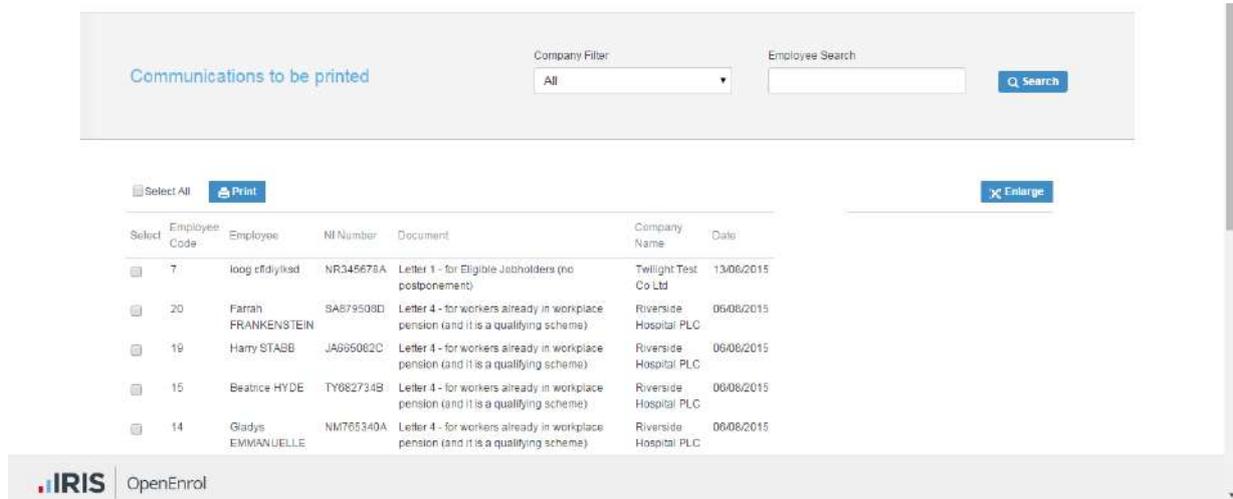
The first screen you see on logging in is the **Employees** tab. This is a summary of what's happened recently within the company.

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



Communications to be printed

Company Filter: All

Employee Search:

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	7	loog cfdiylkad	NR345673A	Letter 1 - for Eligible Jobholders (no postponement)	Twilight Test Co Ltd	13/06/2015
<input type="checkbox"/>	20	Farran FRANKENSTEIN	SAB79503D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	19	Harry STABB	JAG95062C	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	15	Beatrice HYDE	TY682734B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	14	Gladys EMMANUELLE	NM765340A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015

IRIS OpenEnrol

Ideally your employees will have email addresses set up within the payroll software so that when you click the **Publish** button (as described within the **Pension Guide**) 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.

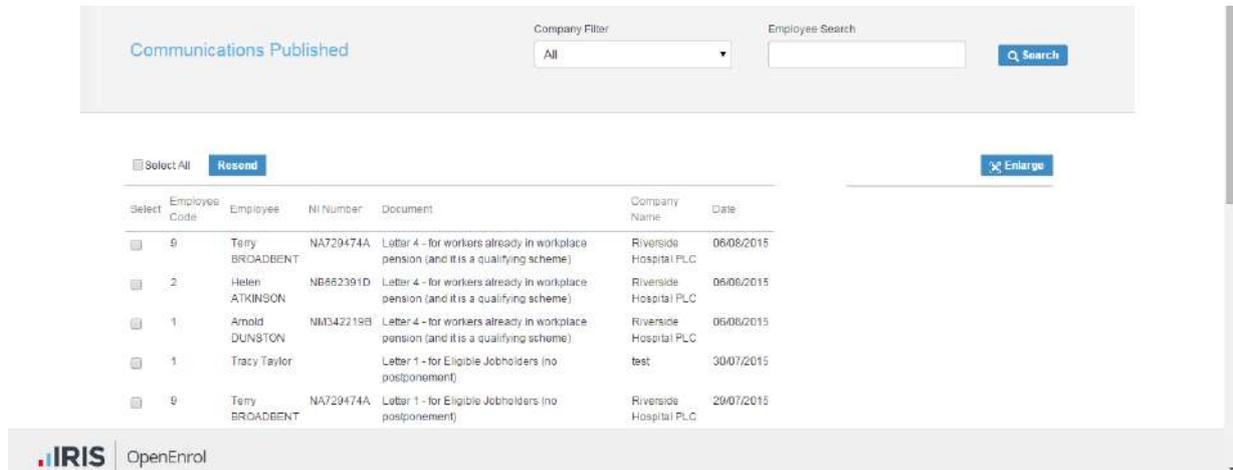
However there may be some employees who are unable to receive their communications this way as they do not have an email address. You are able to print their letters via this **Print** section of the IRIS OpenEnrol portal and send them a physical copy, whilst retaining a record of having sent the communication 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



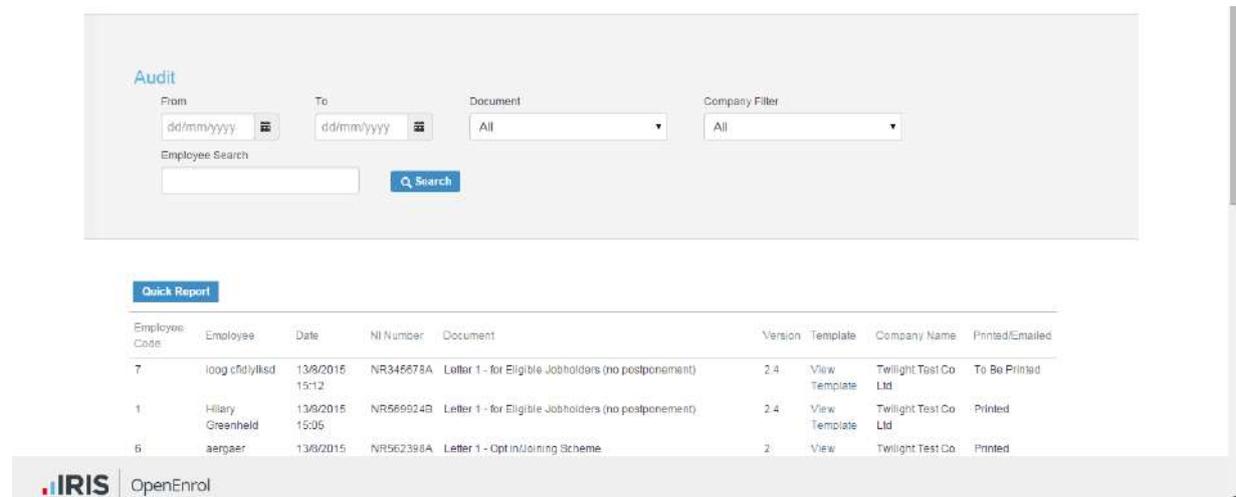
The screenshot shows the 'Communications Published' interface. At the top, there is a 'Company Filter' dropdown set to 'All' and an 'Employee Search' input field with a 'Search' button. Below this is a table of communications. The table has columns for 'Select', 'Employee Code', 'Employee', 'NI Number', 'Document', 'Company Name', and 'Date'. There are 'Select All' and 'Resend' buttons at the top left of the table, and an 'Enlarge' button at the top right. The table contains five rows of data.

Select	Employee Code	Employee	NI Number	Document	Company Name	Date
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	2	Helen ATKINSON	NB662391D	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/06/2015
<input type="checkbox"/>	1	Arnold DUNSTON	NM342219B	Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	Riverside Hospital PLC	06/08/2015
<input type="checkbox"/>	1	Tracy Taylor		Letter 1 - for Eligible Jobholders (no postponement)	test	30/07/2015
<input type="checkbox"/>	9	Terry BROADBENT	NA729474A	Letter 1 - for Eligible Jobholders (no postponement)	Riverside Hospital PLC	29/07/2015

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 screenshot shows the 'Audit' section of the IRIS system. It includes a search interface with the following elements:

- From:** A date input field with a calendar icon, set to 'dd/mm/yyyy'.
- To:** A date input field with a calendar icon, set to 'dd/mm/yyyy'.
- Document:** A dropdown menu currently set to 'All'.
- Company Filter:** A dropdown menu currently set to 'All'.
- Employee Search:** A text input field with a magnifying glass icon and a 'Search' button.

Below the search interface is a 'Quick Report' button and a table of audit entries:

Employee Code	Employee	Date	NI Number	Document	Version	Template	Company Name	Printed/Emailed
7	loog cfdlylltd	13/8/2015 15:12	NR346678A	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	To Be Printed
1	Hilary Greenheld	13/8/2015 15:35	NR569924B	Letter 1 - for Eligible Jobholders (no postponement)	2.4	View Template	Twilight Test Co Ltd	Printed
6	aergaer	13/8/2015	NR562388A	Letter 1 - Opt In/Joining Scheme	2	View	Twilight Test Co	Printed

At the bottom left of the interface, the IRIS logo and the text 'OpenEnrol' are visible.

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**, **Client 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

Template History

Template Type	Version	Reason For Change	Live Date	View
Auto Enrolment Is Coming	1.3	Logo changed	2015-07-16	View Template
Letter 1 - for Eligible Jobholders (no postponement)	2.4	Logo changed	2015-07-16	View Template
Letter 1P - for Eligible Jobholders (Postponement Version)	2	Initial Version	2014-12-03	View Template
Letter 1T - for Eligible Jobholders (Transitional Version)	2	Initial Version	2014-12-03	View Template
Letter 1 - Opt in/Joining Scheme	2	Initial Version	2014-12-03	View Template
Letter 2 & 3 - for Non-Eligible Jobholders and Entitled Workers	2	Initial Version	2014-12-03	View Template
Letter 4 - for workers already in workplace pension (and it is a qualifying scheme)	2	Initial Version	2014-12-03	View Template
Letter 6 - for all workers - postponement	2	Initial Version	2014-12-03	View Template

⏪ ⏩
Displaying items 1 - 8 of 8

OpenEnrol

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

Edit Template

⏪ Back
Edit Logo...
Edit Signature...

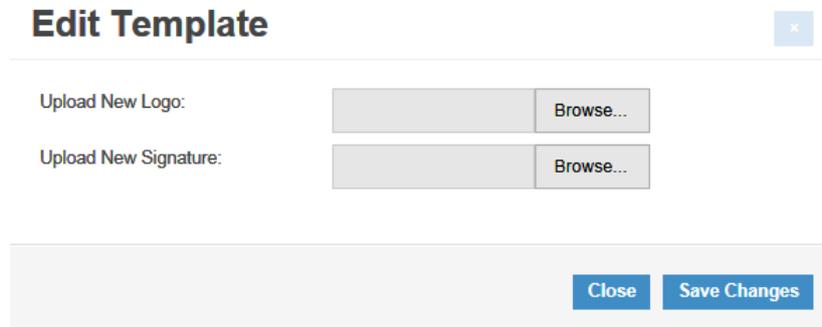
Version	Document	Reason of Change	Live Date	View Template
1.3	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1.2	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1.1	Auto Enrolment Is Coming	Logo changed	2015-07-16	View Template
1	Auto Enrolment Is Coming	Initial Version	2014-06-20	View Template

⏪ ⏩
Displaying items 1 - 4 of 4

OpenEnrol

To add your logo to the template:

1. Click the **Edit Logo** button

A screenshot of a web application dialog box titled "Edit Template". The dialog has a close button (an 'x' in a square) in the top right corner. Below the title bar, there are two rows of upload options. The first row is labeled "Upload New Logo:" and has a grey input field followed by a "Browse..." button. The second row is labeled "Upload New Signature:" and also has a grey input field followed by a "Browse..." button. At the bottom right of the dialog, there are two blue buttons: "Close" and "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 and P60s to employees. Payslips and P60s 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 and/or P60s in an easy to access, secure area.

- All payslip/P60 information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips/P60s 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 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 on tablets or smartphones

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 and/or P60s

How to create an IRIS OpenPayslips account

1. Visit the IRIS OpenPayslips website at <https://www.irisopenpayslips.co.uk/>

The screenshot shows the IRIS OpenEnrol and OpenPayslips website. At the top left is the IRIS logo and the text 'OpenEnrol OpenPayslips'. A green 'LOGIN' button is in the top right. The main heading is 'Welcome to IRIS OpenEnrol and IRIS OpenPayslips'. Below this is a sub-heading 'New - All your automatic enrolment communications and payslips in one place!'. A bolded paragraph states: 'Employees have to be informed at key stages in the automatic enrolment process. The communications required will be set by their worker status and what stage they are at in the process, and the triggers behind this are complex.' Below this is a paragraph: 'IRIS OpenEnrol takes care of the communications element, so you don't have to. IRIS has worked closely with The Pensions Regulator to ensure your workers receive the right communications at the right time.' A green 'TRY NOW' button is on the right. Another paragraph follows: 'As an employer you have a legal obligation to support your employees with payslips and P60s. IRIS OpenPayslips helps automate and streamline this process, saving time, money and helping reduce your carbon footprint.' Below that is: 'IRIS OpenPayslips allows you to publish payslips and P60s electronically from within your IRIS payroll software to a secure online portal. Once delivered your employees can view their current and historic payslips via their smartphone, tablet, laptop or desktop computer, whenever they want'. A final line says: 'For more information on Pricing or to receive a quote please call 08448155700.' At the bottom, there are two columns of benefits. The left column is 'Benefits to the client' and the right is 'Benefits to the employees'. Both columns list three benefits with checkmarks.

Benefits to the client

- ✓ Quick and easy to setup with no software to install
- ✓ One location for all communications including automatic enrolment, payslips and P60s
- ✓ Helps ensure automatic enrolment compliance with full audit trail

Benefits to the employees

- ✓ Allows employees immediate 24/7 access to all their communications
- ✓ Employees can access communications in one secure, online location

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

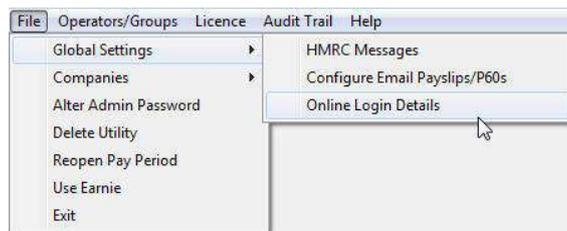
The screenshot shows the 'Create a new account' registration form. At the top left is the IRIS logo and the text 'OpenEnrol OpenPayslips'. The heading is 'Create a new account'. Below this is a paragraph: 'Please complete the form below to create new account for your organisation, note that only one account per organisation is required, do not use this form to create user accounts.' Below that is: 'To complete the registration a confirmation email will be sent to your email address with an activation link.' The form is divided into two columns: 'New Organisation Details' and 'New Administrator'. The 'New Organisation Details' column has fields for: Organisation Name, Customer Reference, Address (multiple lines), Town, Postcode, Country, Telephone, Contact Email Address, and Web Address. The 'New Administrator' column has fields for: Email Address, Confirm Email Address, Forename, and Surname. Below these are two checkboxes: 'I am an Accountant/Bureau' and 'I have read and agree to the Terms and Conditions'. At the bottom right are 'Create' and 'Cancel' buttons.

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**

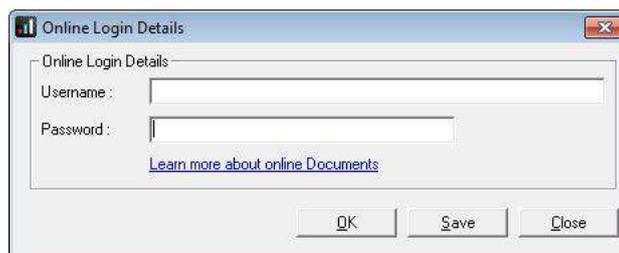
How to update the payroll software

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

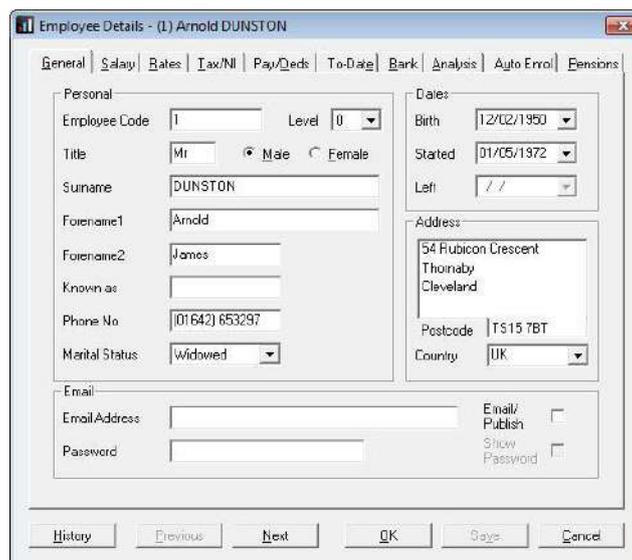
1. Log into **Admin**, click on **File | Global Settings | Online Login Details**



2. Enter the username and password registered on the IRIS OpenPayslips website and click **OK**



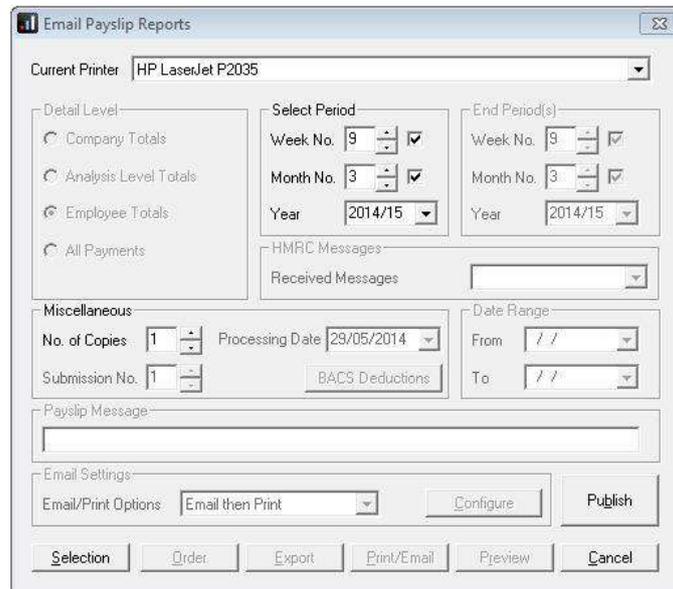
3. Log back into the payroll and make sure all employees have up-to-date, valid email addresses within **Employee Details** and they have the **Email/Publish** box ticked



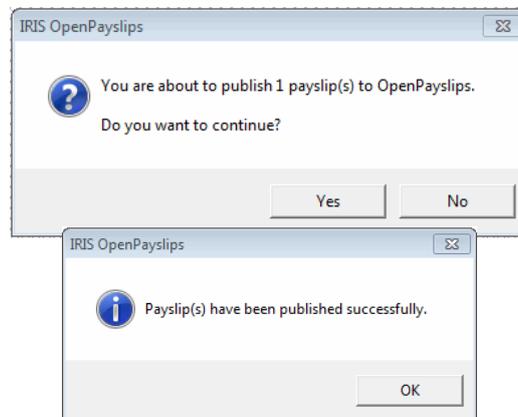
How to publish payslips/P60s to the IRIS OpenPayslips portal

Payslips

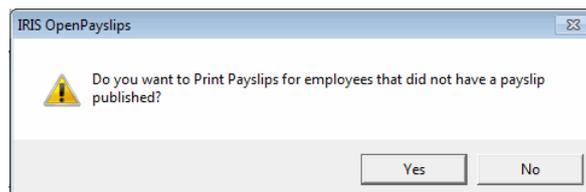
1. Go to **Reports | Print Payslips** and select your email payslip and the required pay periods



2. Click the IRIS OpenPayslips **Publish** button on the **Email Payslip Reports** screen



3. If not all employees have an email address, a message will appear asking if you wish to print payslips for those individuals



4. Select **Yes** or **No**
5. All employees paid in the selected pay period with an email address will then be sent an email asking them to register with the IRIS OpenPayslips website to view/print their payslip

P60s

1. From **Reports | Library Selection | Year End**, add the **E-P60 Plain Paper Laser**
2. Go to **Reports | Year-end Reports**
3. Select the **E-P60 Plain Paper Laser**, click **OK**
4. Click the **Publish** button on the screen

Email P60 Reports

Current Printer: HP LaserJet P2035

Detail Level:

- Company Totals
- Analysis Level Totals
- Employee Totals
- All Payments

Select Period:

Week No. 1

Month No. 1

Year 2014/15

End Period(s):

Week No. 52

Month No. 12

Year 2014/15

HMRC Messages:

Received Messages: []

Miscellaneous:

No. of Copies: 1 Processing Date: 17/03/2014

Submission No.: 1 BACS Deductions: []

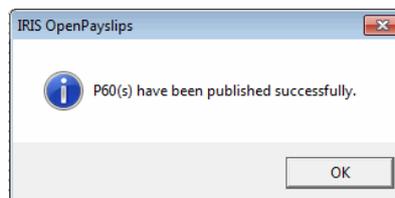
Date Range:

From: / / To: / /

Payslip Message: []

Email Settings:

Email/Print Options: Email then Print



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

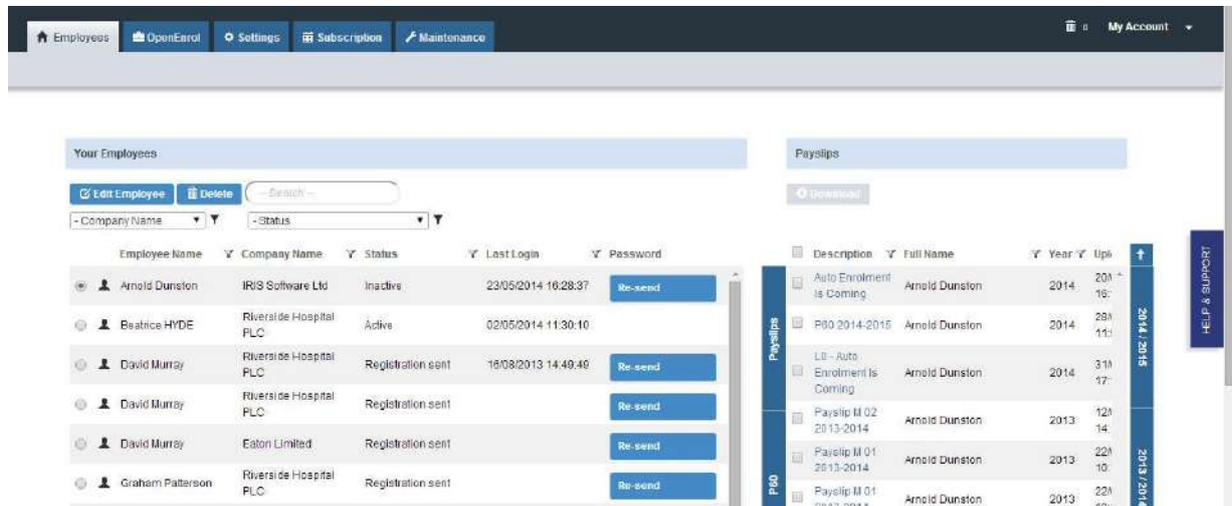
How the employer views the published payslips/P60s

To view the published payslips/P60s:-

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 you wish to look at then click on either the **Payslips** tab or **P60** tab and the screen changes again to show the payslips/P60s uploaded for the employee in that tax year
4. Click on the Payslip or P60 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 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**

Edit Employee Details X

Employee Details

First Name

Last Name

E-Mail Address

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

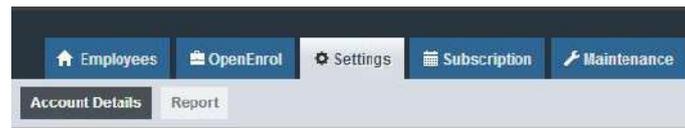
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips/P60s

IRIS OpenEnrol

IRIS OpenEnrol is 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:
 - 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
 - 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**
 - 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**.

- Select **Contract** to display your Contract ID, Contract Type, Start Date and End Date
- Click on **Invoice History** to view, print or export invoices

Maintenance

The **Maintenance** tab allows you to recall payslips that have been sent in error. You can recall **Payslips, P60s** 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 in the email, it will not work.