



# **Guide to setting up IRIS OpenPayslips**

## **IRIS Payroll Basics**

01/09/2015



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Dear Customer,

Welcome to your guide to setting up and using IRIS OpenPayslips.

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

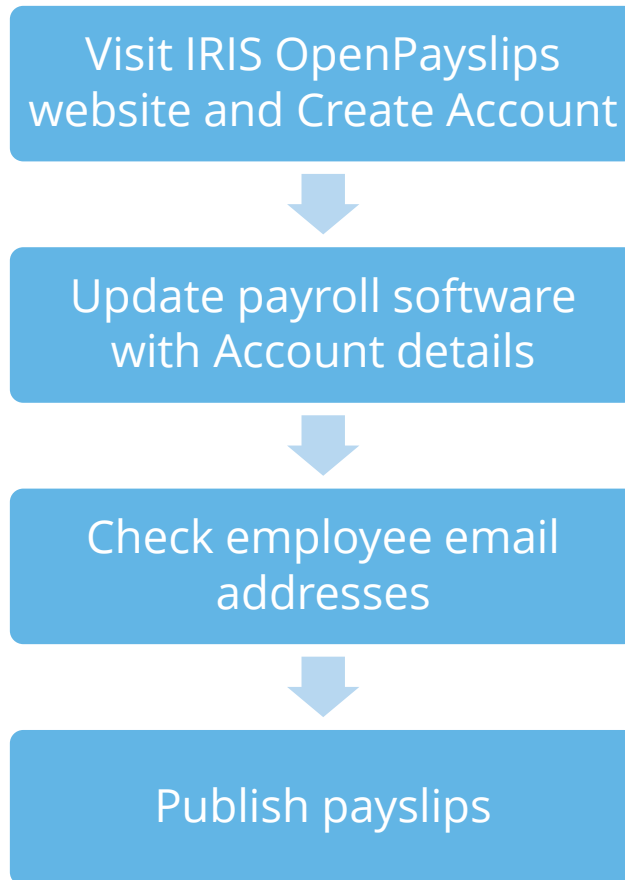
Further help can also be found on our [website](#)

## What is IRIS OpenPayslips?

IRIS OpenPayslips is a new way to distribute payslips to employees. Payslips 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 in an easy to access, secure area.

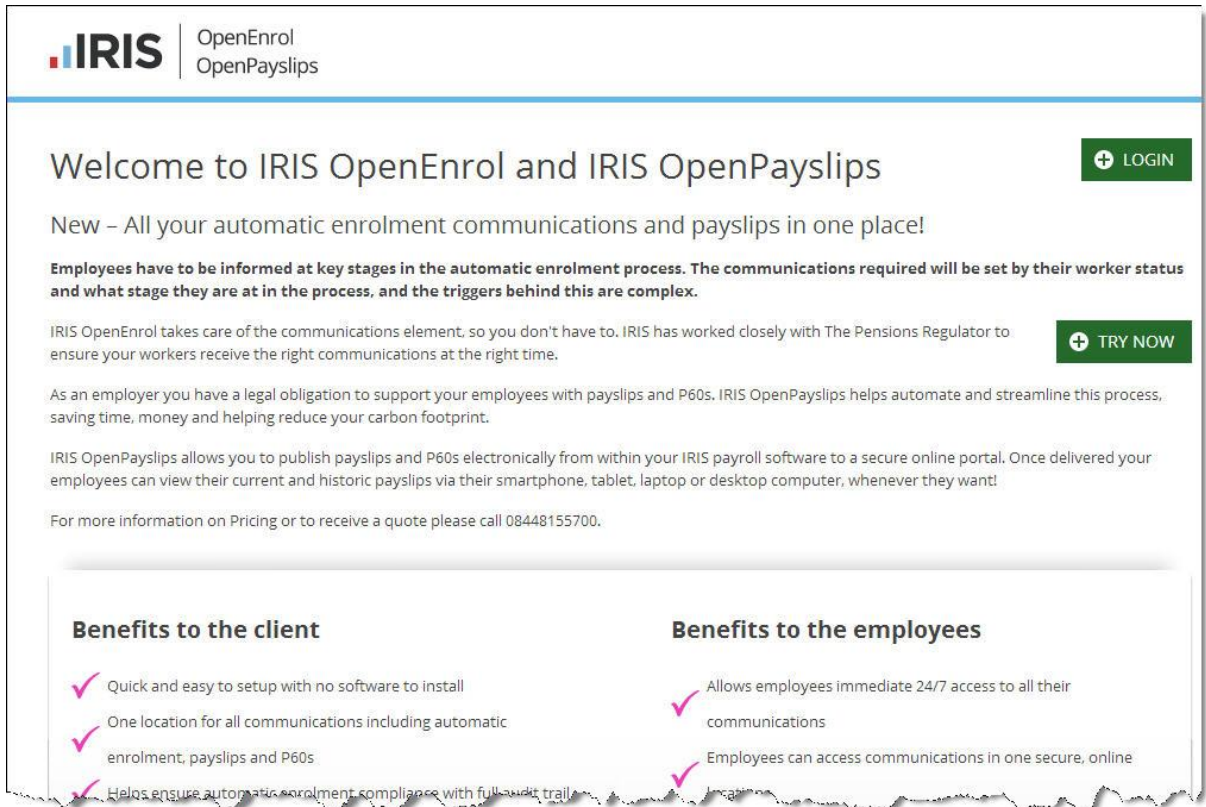
- All payslip information is taken directly from the payroll software and displayed exactly how they are usually seen
- Payslips can be accessed anywhere an internet connection is available
- Quick and easy to setup with no software to install
- Increases payroll processing efficiency
- Reduces carbon footprint demonstrating an environmentally friendly solution
- Reduces payslip 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 on tablets or smartphones

## Steps to setting up and using IRIS OpenPayslips



## How to create an IRIS OpenPayslips account

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



**IRIS** | OpenEnrol  
OpenPayslips

### Welcome to IRIS OpenEnrol and IRIS OpenPayslips

[+ LOGIN](#)

**New – All your automatic enrolment communications and payslips in one place!**

**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.**

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.

[+ TRY NOW](#)

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.

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!

For more information on Pricing or to receive a quote please call 08448155700.

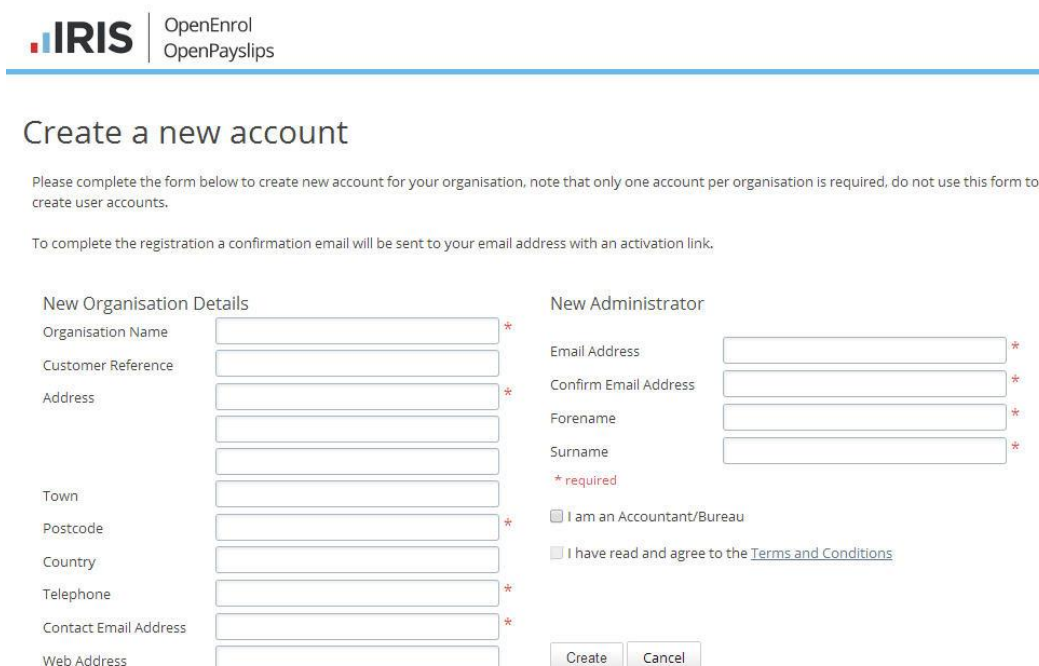
#### Benefits to the client

- ✓ 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:



**IRIS** | OpenEnrol  
OpenPayslips

### Create a new account

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.

To complete the registration a confirmation email will be sent to your email address with an activation link.

#### New Organisation Details

Organisation Name \*

Customer Reference \*

Address \*

Town \*

Postcode \*

Country \*

Telephone \*

Contact Email Address \*

Web Address

#### New Administrator

Email Address \*

Confirm Email Address \*

Forename \*

Surname \*

\* required

☐ I am an Accountant/Bureau

☐ I have read and agree to the [Terms and Conditions](#)

[Create](#) [Cancel](#)

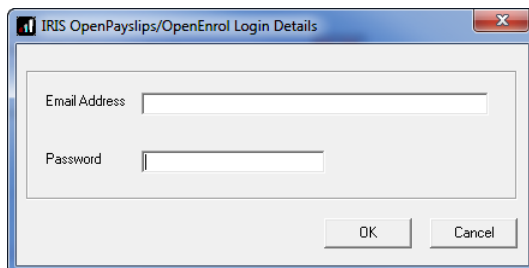
3. Enter the required details then click **Create**. An activation email will be sent to the **New Administrator - Email Address**
4. Click the link in the email to be taken back to the IRIS OpenPayslips website
5. Enter a **Password** and click **Set Password**

## 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.

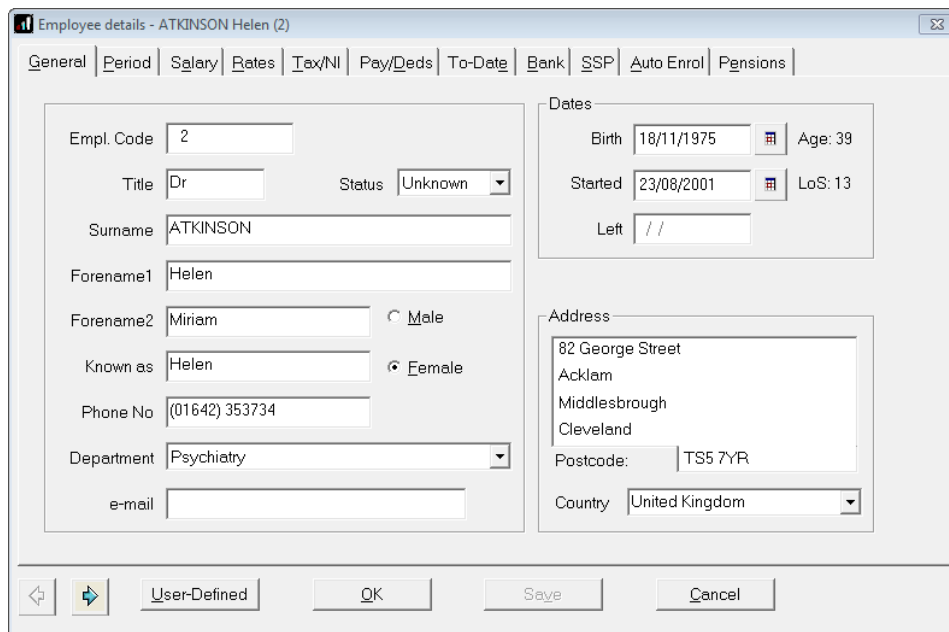
1. Log into **Admin**, click on **File | Online Login Details | OpenEnrol/OpenPayslips**

Enter the email address and password registered on the IRIS OpenPayslips website and click **OK**



A screenshot of the 'IRIS OpenPayslips/OpenEnrol Login Details' dialog box. It contains two input fields: 'Email Address' and 'Password'. Below the fields are 'OK' and 'Cancel' buttons.

2. Log back into the payroll and make sure all employees have up-to-date, valid email addresses within **Employee details**



A screenshot of the 'Employee details - ATKINSON Helen (2)' window. The window has multiple tabs: General, Period, Salary, Rates, Tax/Nl, Pay/Deds, To-Date, Bank, SSP, Auto Enrol, and Pensions. The 'General' tab is active. It contains various fields for employee information:

- Empl. Code: 2
- Title: Dr
- Status: Unknown
- Surname: ATKINSON
- Forename1: Helen
- Forename2: Miriam
- Known as: Helen
- Phone No: (01642) 353734
- Department: Psychiatry
- e-mail: (empty field)
- Dates: Birth 18/11/1975, Age: 39, Started 23/08/2001, LoS: 13, Left //
- Address: 82 George Street, Acklam, Middlesbrough, Cleveland, Postcode: TS5 7YR, Country: United Kingdom

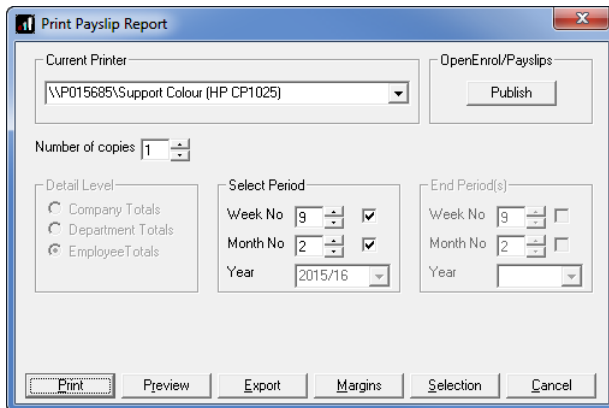
At the bottom, there are buttons for 'User-Defined', 'OK', 'Save', and 'Cancel'.



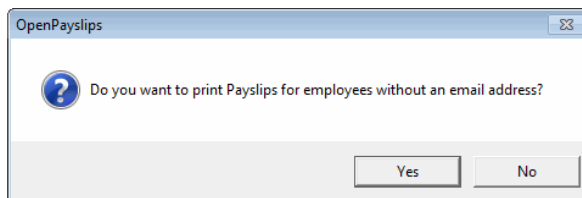
## How to publish payslips to the IRIS OpenPayslips portal

### Payslips

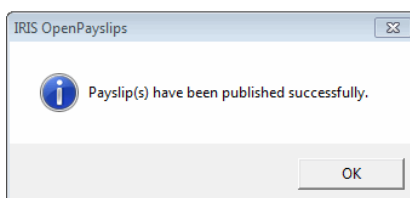
1. Go to **Reports | Print Payslips** and select the required pay periods



2. Click the OpenEnrol/Payslips **Publish** button in the top right of the **Print Payslip Report** 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. Click **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

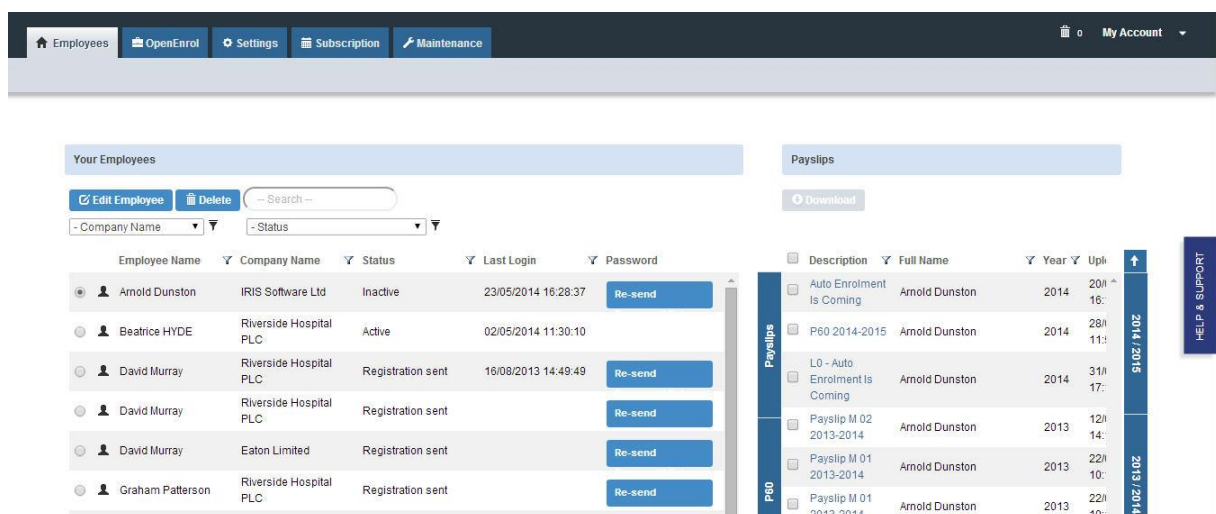
## How the employer views the published payslips

To view the published payslips:

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 the **Payslips** tab
4. The screen changes again to show the payslips uploaded for the employee in that tax year
5. Click on the Payslip and a new browser tab will open containing a copy to be viewed or printed as needed
6. Click back to the first browser tab to return to IRIS OpenPayslips

## Managing the IRIS OpenPayslips Account

The main page has five tabs on the top left, **Employees**, **OpenEnrol**, **Settings**, **Subscription** and **Maintenance**. (IRIS OpenEnrol is part of the IRIS AE Suite™, not available in IRIS Payroll Basics. Contact Sales on 0844 815 5700 for more information).



The screenshot shows the IRIS OpenPayslips web interface. At the top, there is a navigation bar with tabs: Employees, OpenEnrol, Settings, Subscription, and Maintenance. Below this, the 'Your Employees' section displays a table of employees with columns for Employee Name, Company Name, Status, Last Login, and Password. A 'Re-send' button is next to each row. To the right, the 'Payslips' section shows a table of payslips with columns for Description, Full Name, Year, and Upload date. A 'Download' button is at the top of this section. A vertical sidebar on the right contains a 'HELP & SUPPORT' button.

Employee Name	Company Name	Status	Last Login	Password
Arnold Dunston	IRIS Software Ltd	Inactive	23/05/2014 16:28:37	Re-send
Beatrice HYDE	Riverside Hospital PLC	Active	02/05/2014 11:30:10	
David Murray	Riverside Hospital PLC	Registration sent	16/08/2013 14:49:49	Re-send
David Murray	Riverside Hospital PLC	Registration sent		Re-send
David Murray	Eaton Limited	Registration sent		Re-send
Graham Patterson	Riverside Hospital PLC	Registration sent		Re-send

Description	Full Name	Year	Upd
Auto Enrolment Is Coming	Arnold Dunston	2014	20/16
P60 2014-2015	Arnold Dunston	2014	28/11
L0 - Auto Enrolment Is Coming	Arnold Dunston	2014	31/17
Payslip M 02 2013-2014	Arnold Dunston	2013	12/14
Payslip M 01 2013-2014	Arnold Dunston	2013	22/10
Payslip M 01 2013-2014	Arnold Dunston	2013	22/10

## 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**



The screenshot shows a web form titled "Edit Employee Details" with a close button (X) in the top right corner. The form is divided into two main sections. On the left, under the heading "Employee Details", there are three input fields: "First Name" containing "Arnold", "Last Name" containing "DUNSTON", and "E-Mail Address" containing "arnold.dunston@riverside.co.uk". Below these fields are two buttons: "Update" and "Cancel". On the right side of the form, there is a placeholder for a profile picture, showing a silhouette of a person and the text "No Practice Image".

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

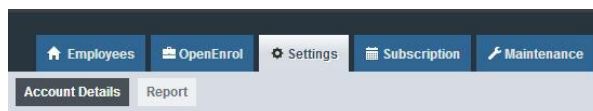
If an employee's email address changes, you must update it in the payroll software AND here, as it will not sync automatically when you publish payslips

## OpenEnrol

IRIS OpenEnrol is another element of the IRIS AE Suite™, not available in IRIS Payroll Basics.  
Contact Sales on 0844 815 5700 for more information.

## 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**.

- **Contract** displays 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** 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. If the employee tries to click on the link to the payslip in the email, it will not work.

## Software and services available:

### IRIS Payroll Business

IRIS Payroll Business is the ideal payroll software if you require more than 10 employees or are looking for additional features and payroll support to make running your payroll quicker and easier.

### KashFlow Payroll

If you need to access your payroll on the go from different devices, KashFlow Payroll is the ideal solution. It is straightforward online payroll software, created specifically for small businesses.

### KashFlow Bookkeeping

KashFlow bookkeeping makes managing your business accounts easy with invoice templates, credit control features and Automatic Bank Feeds to directly import your bank transactions

### 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.

### 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: <a href="mailto:helpdesk@ir-efile.gov.uk">helpdesk@ir-efile.gov.uk</a>	

## Contact Sales (including stationery)

Telephone	Email
0844 815 5700	<a href="mailto:sales@iris.co.uk">sales@iris.co.uk</a>