

# Earnie

Guide to the IRIS HR Manager link



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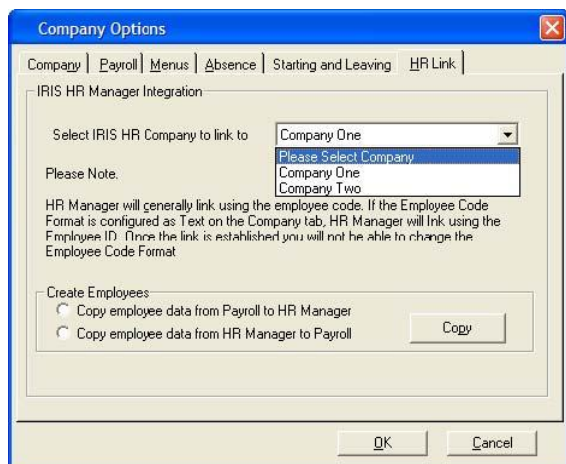
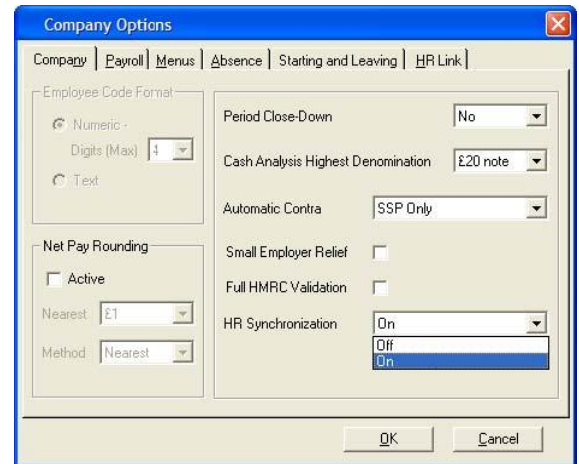
## How the link works

The dynamic link between **Earnie** and **IRIS HR Manager** enables you to make changes to employees within a company on one of the systems, and have those changes automatically made to the employees on the other system.

- Any employee that exists in one system will be created in the other
- Amendments made in one system will be immediately replicated in the other

## Setting up the link – step by step

1. Make sure IRIS HR Manager is closed down
2. In Earnie, open the **Company** you want to link
3. Click on the **Company** menu and select '**Alter Company Options**'
4. On the **Company** tab, look for **HR Synchronization** in the bottom right
5. Click on the drop down list and select '**On**'
6. You are automatically taken to the **HR Link** tab. From the drop down list, select the IRIS HR Manager company to link to.
7. Click '**OK**' to save the link configuration



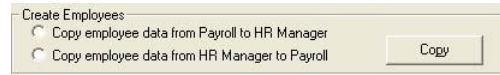
Repeat Steps 2 to 7 for each Company you want to link to IRIS HR Manager.

## Create Employees

Using the link it is possible to copy an entire company's employees from Earnie to IRIS HR Manager or vice versa.

### Copying employees from Earnie to IRIS HR Manager:

1. Create a new company in IRIS HR Manager with no employees
2. Close IRIS HR Manager
3. Using this guide, create the link in Earnie
4. When the screen changes to the HR Link tab, select the new company created in IRIS HR Manager from the drop-down list
5. At the bottom of the screen are the options:
6. Select '**Copy employee data from Payroll to HR Manager**'
7. Click '**Copy**'
8. Click '**OK**' to close the screen
9. Open the company in IRIS HR Manager. You should see all of the employees transferred from Earnie



### Copying employees from IRIS HR Manager to Earnie:

1. Create a new company in Earnie with no employees
2. Using this guide, create the link in Earnie
3. When the screen changes to the HR Link tab card, select the IRIS HR Manager company you want to link to from the drop down list
4. At the bottom of the screen are the options:
5. Select '**Copy employee data from HR Manager to Payroll**'
6. Click '**Copy**'
7. Click '**OK**'



## After the Link is created

Once the link between a company in Earnie and IRIS HR Manager is created, you can access each system from within the other.

### Opening IRIS HR Manager from within Earnie

In Earnie, an IRIS HR Manager button will appear in the Employee section of the side bar when a company is linked.

On brand new installations of Earnie, using version 1.15.50 or greater, a button will also appear in the toolbar, between the **Change Payroll Date** and **Exit** icons. The button will be activated when the company in use has the link enabled.

Click the  button from the **Employee** section of the Earnie side bar to switch to IRIS HR Manager, if it is already running.

If IRIS HR Manager is not already running but your user name and password for Earnie are the

same as for a HR company, that particular HR company will be opened.

The IRIS HR Manager login screen will appear if the system is not already running and/or your Earnie login details are not the same as for a HR company.

### Opening Earnie from within IRIS HR Manager

In IRIS HR Manager, after the link is established, the menu item **Payroll** will appear between **Setup** and **Window**. The menu item will remain until IRIS HR Manager is restarted, even if a non-linked company is subsequently opened.

Select the **Payroll** menu item from within IRIS HR Manager to switch to Earnie if it is already running. If the system is not already running but your username and password for IRIS HR Manager are the same as for Earnie, the relevant payroll company will be opened. If Earnie is not running and the IRIS HR Manager username and password are not the same, then the Earnie login screen will appear.

## IMPORTANT Considerations

- You need to create the company in IRIS HR Manager before you can set up the link
- It is best to close IRIS HR Manager when you are synchronising data. If you leave it open, IRIS HR Manager will not display the updated information until it has been closed and restarted
- You do not have to create Departments in your IRIS HR Manager company, the link will create them for you
- If an Employee Code is greater than 32767 the Employee will not be created in IRIS HR Manager as the system cannot cope with a code that size
- If the Employee Code in Earnie is configured as Text format, the option to link to IRIS HR Manager will be disabled. To check if this is the case, go to the **Company** menu and select **Alter Company Options**. The **Employee Code Format** is on the **Company** tab
- When initially creating the link using **Copy employee data from HR Manager to Payroll**, several fields will not be transferred. They will be updated in Earnie when they are next amended in IRIS HR Manager. The fields affected are Previous Tax; Previous Gross; Tax This Employment; Gross Taxable Pay This Employment; Total Pay This Employment (Gross Niabile Pay); Director Status; Director Since Week
- If you restore a back-up to either system, you will need to manually redo any changes made to employees since that back-up was taken
- Creating a Leaver in HR Manager will result in an Automatic Action (to P45 the employee) being created in Earnie

## Appendix – Affected fields

Fields which are linked/synchronised

The current list of supported fields is:-

|                                   |  |
|-----------------------------------|--|
| Address1                          |  |
| Address2                          |  |
| Address3                          |  |
| Address4                          |  |
| Also Known As                     |  |
| Annual Salary                     |  |
| Bank Account No                   |  |
| Bank Account Payee Name           |  |
| Bank Branch                       |  |
| Bank Name                         |  |
| Bank Reference                    |  |
| Bank Sort Code                    |  |
| Building Society Reference Number |  |
| Carry Over Entitlement            |  |
| Date of Birth                     |  |
| Department Name                   |  |
| Director Since Week               | Display only field in HR Manager when linked to IPP – changes must be made in payroll                    |
| Director Status                   | Display only field in HR Manager when linked to IPP – changes must be made in payroll                    |
| Email Address                     |  |
| Forename1                         |  |
| Forename2                         |  |
| Gross Taxable Pay This Employment | Display only field in HR Manager. Displays <b>Taxable Gross To-date – P45 Figures Gross Pay</b> from IPP |
| Holiday Allowance                 |  |
| Holiday Year End Date             |  |
| Job Title                         |  |

|   |   |
|---|---|
| <b>Male / Female</b>                                |   |
| <b>Marital Status</b>                               | <b>Divorced, Married</b> and <b>Other</b> have been added to HR   |
| <b>Next Tax Pay Period</b>                          | When an employee is created in HR and transferred to payroll the <b>Next Tax Pay Period</b> will be set to the last one run in IPP plus 1, 2 or 4 depending on the pay frequency. e.g. Last payroll was Month 1 set the next pay period to 2, last paid week 6 for a two weekly person then the next pay period will be set to 8                |
| <b>NI Number</b>                                    |   |
| <b>NI Rate</b>                                      |   |
| <b>Pay Frequency</b>                                | Frequency of <b>On Hold</b> and <b>Quarterly</b> will not be passed to HR Manager as they do not exist. If the employee data in IPP has either of those options it will not be overwritten by HR data.<br><br>When creating a new employee in HR from IPP if either option has been selected the HR Manager field will be set to <b>Monthly</b> |
| <b>Pay Method</b>                                   |   |
| <b>Post Code</b>                                    |   |
| <b>Previous Gross</b>                               | Will not be linked to IPP after an employee has left  |
| <b>Previous Tax</b>                                 | Will not be linked to IPP after an employee has left  |
| <b>Rate 1 and Pay Screen Defaults</b>               | If the <b>Rate Indicator</b> is set to <b>Hourly</b> in HR Manager the link will apply to <b>Hours per &lt;Pay Period&gt;</b> and <b>Pay Rate(£)</b> on the HR Manager side. In IPP <b>£/Hour</b> for Rate 1 and <b>Hours</b> for the first line in the <b>Pay Screen Default for this Employee</b> table with the same rate will be linked     |
| <b>SSP Qualifying Days</b>                          | The link will be with row1 in IPP   |
| <b>Start Date</b>                                   |   |
| <b>Surname</b>                                      |   |
| <b>Tax Basis</b>                                    |   |
| <b>Tax Code</b>                                     |   |
| <b>Tax This Employment</b>                          | Display only field in HR Manager. Displays <b>Tax Paid To-date – P45 Figures Tax Paid</b> from IPP  |
| <b>Telephone No</b>                                 |   |
| <b>Title</b>  |   |
| <b>Total Pay This Employment (Gross Niable Pay)</b> | Display only field in HR Manager. Displays <b>Niable Gross To-date – P45 Figures Gross Pay</b> from IPP   |

The following are only called when there is a change:

Diary Information - write only

Annual Salary updated – write only

Finish Date updated – write only

Fields which cannot be linked/synchronised:

**Holiday Remaining** and **Holiday Left**

**Absence information**



## Software available from IRIS

### **Earnie Intro**

An introduction to payroll software for small businesses with up to 30 employees

### **Earnie Business**

Suitable for growing businesses with up to 100 employees

### **Earnie Executive**

Suitable for larger organisations with over 100 employees and bureaus

### **Earnie IQ**

Based on the latest SQL technology, Earnie IQ is suitable for those companies with more complex requirements

### **IRIS HR Manager**

The easy way to keep employee data up-to-date

### **IRIS OpenPayslips**

A secure web based solution that allows your employees to access, and download their e-payslips via an online portal

## Stationery order line

0844 815 5676

## HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

Email: [helpdesk@ir-efile.gov.uk](mailto:helpdesk@ir-efile.gov.uk)

## HMRC employer helpline

Tel: 0300 200 3200

## HMRC employer helpline (for new business)

Tel: 0300 200 3211

## Sales

Tel: 0844 815 5676

Fax: 0844 815 5680

Email: [sales@earnie.co.uk](mailto:sales@earnie.co.uk)

## Support

Tel: 0844 815 5671

Fax: 0844 815 5675

Email: [support@earnie.co.uk](mailto:support@earnie.co.uk)