A Guide to the EARNIE and IRIS HR Manager Link

Contents

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

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Setting up the link – step by step

1. Make sure **IRIS HR Manager** has been closed down.

2. In **EARNIE**, open the **Company** you wish to link to **IRIS HR Manager**.

3. Click on the **Company** menu and select **Alter Company Options**

4. On the **Company** tab card, 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 card. From the drop down list, select the **IRIS HR Manager** company to link to.

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:

   a.   Create a new company in **IRIS HR Manager** with no employees

   b.   Close **IRIS HR Manager**

   c.   Using this guide, create the link in **EARNIE**

   d.   When the screen changes to the **HR Link** tab card, select the new company created in **IRIS HR Manager** from the drop down list

   e.   At the bottom of the screen are the options:

   f.   Select **Copy employee data from Payroll to HR Manager**

   g.   Click **Copy** and you will then see the message:

   Synchronising with HR please wait

   h.   Click **OK** to close the screen

   i.   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:

   a.   Create a new Company in **EARNIE** with no employees

   b.   Using this guide, create the link in **EARNIE**

   c.   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

   d.   At the bottom of the screen are the options:

   e.   Select **Copy employee data from HR Manager to Payroll**

   f.   Click **Copy** and you will then see the message:

   Synchronising with HR please wait

   g.   Click **OK**

7.   Click **OK** to save the link configuration.

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

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

1. You need to create the **Company** in **IRIS HR Manager** before you can set up the link

2. 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

3. You do not have to create **Departments** in your **IRIS HR Manager** company, the link will create them for you

4. 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

5. 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 card

6. 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 Niable Pay)**; **Director Status**; **Director Since Week**

7. If you a restore a back-up to either system, you will need to manually redo any changes made to employees since that back-up was taken

8. 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 EARNIE – changes must be made in payroll
Director Status	Display only field in HR Manager when linked to EARNIE – changes must be made in payroll
Email Address	
Forename1	
Forename2	
Gross Taxable Pay This Employment	Display only field in HR Manager. Displays **Taxable Gross To-date – P45 Figures Gross Pay** from EARNIE
Holiday Allowance	
Holiday Year End Date	
Job Title	
Male / Female	
Marital Status	**Divorced**, **Married** and **Other** have been added to HR
Next Tax Pay Period	When an employee is created in HR and transferred to payroll the **Next Tax Pay Period** will be set to the last one run in EARNIE 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
NI Number	
NI Rate	
Pay Frequency	Frequency of **On Hold** and **Quarterly** will not be passed to HR Manager as they do not exist. If the employee data in EARNIE has either of those options it will not be overwritten by HR data. When creating a new employee in HR from EARNIE if either option has been selected the HR Manager field will be set to **Monthly**
Pay Method	
Post Code	
Previous Gross	Will not be linked to EARNIE after an employee has left
Previous Tax	Will not be linked to EARNIE after an employee has left
Rate 1 and Pay Screen Defaults	If the **Rate Indicator** is set to **Hourly** in HR Manager the link will apply to **Hours per <Pay Period>** and **Pay Rate(£)** on the HR Manager side. In EARNIE **£/Hour** for Rate 1 and **Hours** for the first line in the **Pay Screen Default for this Employee** table with the same rate will be linked
SSP Qualifying Days	The link will be with row1 in EARNIE
Start Date	
Surname	
Tax Basis	
Tax Code	
Tax This Employment	Display only field in HR Manager. Displays **Tax Paid To-date – P45 Figures Tax Paid** from EARNIE
Telephone No	
Title	

Total Pay This Employment (Gross Nlable Pay)	Display only field in HR Manager. Displays **Niable Gross To-date – P45 Figures Gross Pay** from EARNIE

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