



Getting Started Guide

IRIS HR Manager

September 2016



Contents

Getting Started	3
Stage 1 – Open the IRIS HR Manager Setup Wizard.....	3
Stage 2 – Registering IRIS HR Manager	3
Stage 3 – Link to the IRIS PAYE-Master Database (optional).....	4
Stage 4 – Create a company.....	5
Stage 5 – Create employees	6
Stage 6 – Create users.....	6

Getting Started

Stage 1 – Open the IRIS HR Manager Setup Wizard

How to open the IRIS HR Manager Setup Wizard:

1. Click on the Microsoft Windows '**Start**' button and select **All Programs | Programs | IRIS Software Ltd | HR Manager | HR Manager**
2. Select **First Install** from the Main Wizard screen
3. Click **Next** – this will display the Licensing window

Stage 2 – Registering IRIS HR Manager

Your licence details are provided by IRIS. If you have not already received your licence details, or if you are having any other difficulties, please phone 0844 815 5700.

1. Click the **Register** button to open the **Main Registration** window
2. Click **Next**, this will open the **Company Details** window. The required information can all be found on your Licence Details document:
 - **Company Name** – type the name of your company. Make sure you use the exact name that has been provided
 - **Customer Key Code** – this will be automatically generated
 - **Contract Number** – type the contract number
 - **Expiry Date** – type or select the expiry date
3. Click **Next** to open the **Licence Details** window. From this screen:
 - **Bureau** – select if your company operates as a bureau, e.g. responsible for managing Human Resources for more than one company. The **Number of companies** option will only be available if you select this box or if you have purchased a licence for multiple companies
 - **Number of companies** – use the up and down arrow keys to select **the Number of companies** (the number available will depend on your licence)
 - **Max employees** – use the up and down arrow keys to select a maximum number of employees (increments of 100)

4. Click **Next** to open the **Authorisation Details** window and type the **Authorisation Code** as printed on your **Licence Details** document

If the **Authorisation Code** is not accepted, check the following:

- Check the **Authorisation Code** matches the number provided by IRIS
 - Check the **Company Name** you entered is identical to the one provided on the **Licence Details** from IRIS
 - Check the **Expiry Date** in the **Company Details** window; this must match the date provided by IRIS
 - If you have a bureau licence, make sure that the correct **Number of companies** has been entered, again this must match the details provided by IRIS
5. Click **Finish** to close the registration stage of the Wizard
 6. Click **Next** to go to **Stage 3 – Link to the IRIS PAYE-Master Database** if you have IRIS PAYE-Master installed, or go to **Stage 4 – Create a Company**

Stage 3 – Link to the IRIS PAYE-Master Database (optional)

The following stage of the Wizard will only be displayed if IRIS PAYE-Master has been previously installed on the same PC. The Setup Wizard will automatically detect IRIS PAYE-Master and display the IRIS PAYE-Master Wizard window.

1. To locate the IRIS PAYE-Master data files, click **Browse**
2. If more than one IRIS PAYE-Master company has been set up, select a company from the list
3. Use the **Add/Remove** button to transfer/remove the desired data files to the list of files that will be imported into IRIS HR Manager
4. Click **Update** to import the file highlighted in the **Datafiles to Update** section
5. Once the import process is completed, click **Next**. This will take you to the **Create Employees** stage of the wizard

Stage 4 – Create a company

At least one company must be created during the first installation. If you have a multi-company licence you can create details for each company during the install, or you have the option to create additional companies at a later date if you prefer.

1. Click **Create Company** to open the **Create Company Wizard**
2. Enter the relevant details for the company (e.g. address, postcode, telephone number). The following information is mandatory:
 - **Address** – first and second fields are required
 - **Postcode**
 - **Holiday Year End** – enter the date that the company’s holiday year ends. This date is used when IRIS HR Manager calculates employees’ remaining holiday each year and defaults to the end of the current calendar year
 - **Auto Holiday Entitlement** – select this if you want holiday to be automatically carried over and added to the next year’s Holiday Entitlement
 - **Employee Documents Folder** – click **Browse** to find and select a folder where employee documents will be stored. If you intend to set up a multi-user configuration, make sure that this folder can be accessed by other IRIS HR Manager users
3. Click **Finish**. The **Save As** dialog will be displayed. Use this dialog to select a location for the Company Database

If you plan to set up IRIS HR Manager for multiple users (i.e. allowing other users to share the central database) make sure that you choose a location with suitable access rights and permissions so that all IRIS HR Manager users will be able to access the HR Central Database

4. Click **Save** – a Creating Database progress bar will be displayed while IRIS HR Manager creates an individual database for the company.

Once this process is complete, the Administrator Login will be created. This login information will be required when you first open IRIS HR Manager. It is important that you record the username/password as it will not be displayed again

5. Click **Yes** to edit the Administration Login details. We recommend you alter this to something more memorable to you. Make sure the user remains set as an administrator
6. Click **Next** to open the **Create Employees** stage of the Wizard

Stage 5 – Create employees

Use this stage of the Wizard to add employees to IRIS HR Manager. It is possible to skip this stage and create your employees when you use IRIS HR Manager for the first time.

1. If more than one company has been created, make sure that you link the employee to the right company. Select a company from the **Please Select a Company** menu list
2. Select **Create Employee**, then **Next**
 - You must complete the mandatory fields. These are highlighted by a red warning sign when you try to save or exit
3. Click **Finish** to close the **Create Employee** stage of the Wizard
4. Click **Next** to open the **Create users** stage of the Wizard

Stage 6 – Create users

Use this stage of the Wizard to add users to IRIS HR Manager (and link them to employees). It is possible to skip this stage and create your users when you use IRIS HR Manager for the first time.

1. If more than one company has been created, make sure that you link the user to the right company. Select a company from the **Please Select a Company** menu list
2. Select **Create User**
3. On the **Add User** window:
 - Enter a unique **User Name, Password/Confirm Password**
 - **Role** – select the appropriate role from the menu
 - **Employee** – if the Manager, HR Manager or User role is selected, an additional menu list of **Employee** names is displayed. Use this list to link the user to a specific employee. For example, the employee John Smith would be linked to the user name John Smith
4. Click **Next** – the **Setup Complete** window will be displayed
5. Click **Finish**
6. The IRIS HR Manager Login screen will be displayed, enter here your username and password. (This will either be the default username and password or the one you have created)

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: 0844 815 5700	Tel: 0844 815 5677
Email: sales@iris.co.uk	Email: earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
IRIS PAYE-Master	0844 815 5661	payroll@iris.co.uk
IRIS Payroll Business	0844 815 5661	ipsupport@iris.co.uk
IRIS Bureau Payroll	0844 815 5661	ipsupport@iris.co.uk
IRIS Payroll Professional	0844 815 5671	payrollpro@iris.co.uk
IRIS GP Payroll	0844 815 5681	gpsupport@iris.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	earniesupport@iris.co.uk