



IRIS HR and IRIS Payroll integration Guide

IRIS Payroll

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Introduction

This guide will give you an overview of how your IRIS HR and IRIS Payroll integrate with each other, from setting up your IRIS HR system to the processes you need to perform each period.

The guide covers:

- Provisioning of IRIS HR
- First use configuration
- Processes each pay period

What is IRIS HR and IRIS Payroll integration?

You can now import and export employee information, from your IRIS HR and IRIS Payroll software, at the click of a button. Your integrated systems will streamline your HR and payroll processes, reducing your administration and manual data entry. This will also reduce potential errors.

Setting up your IRIS HR

You only need to complete the setup process once.

Installing the Import and Export definitions

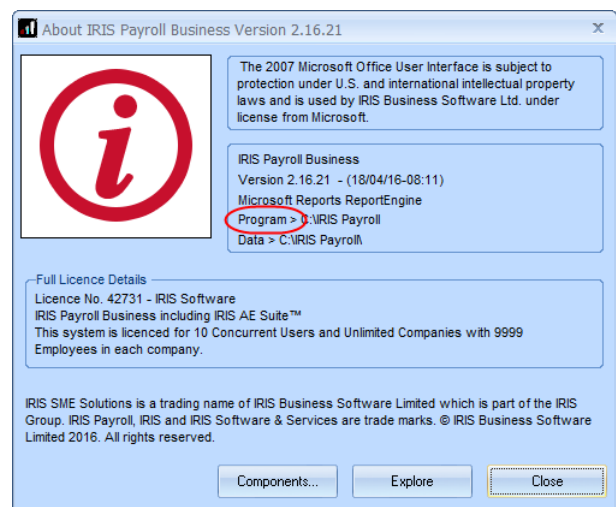
1. Download a zip file containing import and export definitions for your payroll software from [here](#)
2. Using an unzipping utility, unzip the files and save them in your payroll program location
3. To check your payroll program location:

For IRIS Payroll Business

Choose **Help | About IRIS Payroll Business**

Click on **Program >**

This will open the program location in Windows Explorer



For IRIS Bureau Payroll / IRIS Payroll for Accountants

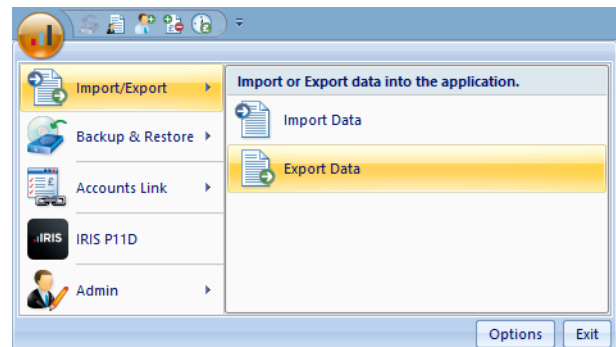
Choose **Help | About IRIS Bureau Payroll**

Click on **Program >**

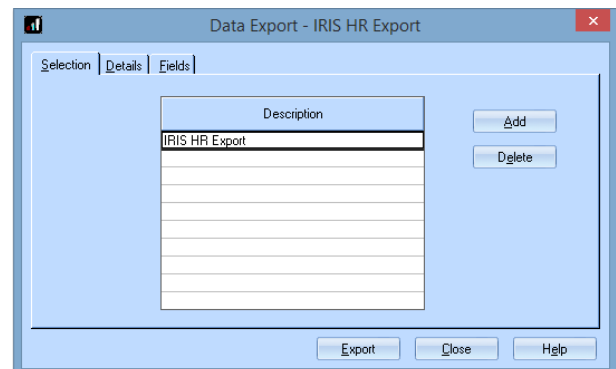
This will open the program location in Windows Explorer

Export employee data from payroll

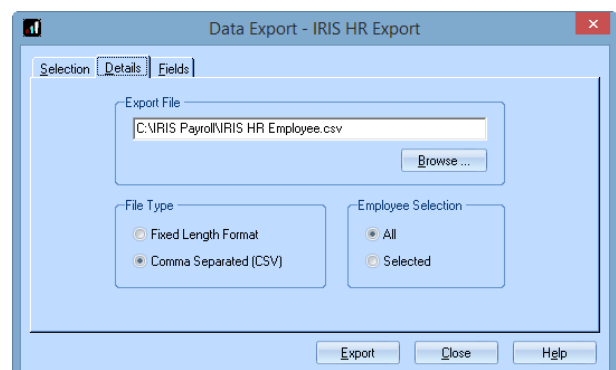
1. It is essential to ensure the mandatory employee fields required by IRIS HR are completed prior to creating the export file
2. From the **Application Menu** select **Import/Export | Export Data**



3. On the **Selection** tab choose **IRIS HR Export**



4. On the **Details** tab browse to the location where you want to save the export file. The file name must be '**IRIS HR Employee.csv**' and the **File Type** must be Comma Separated (CSV)

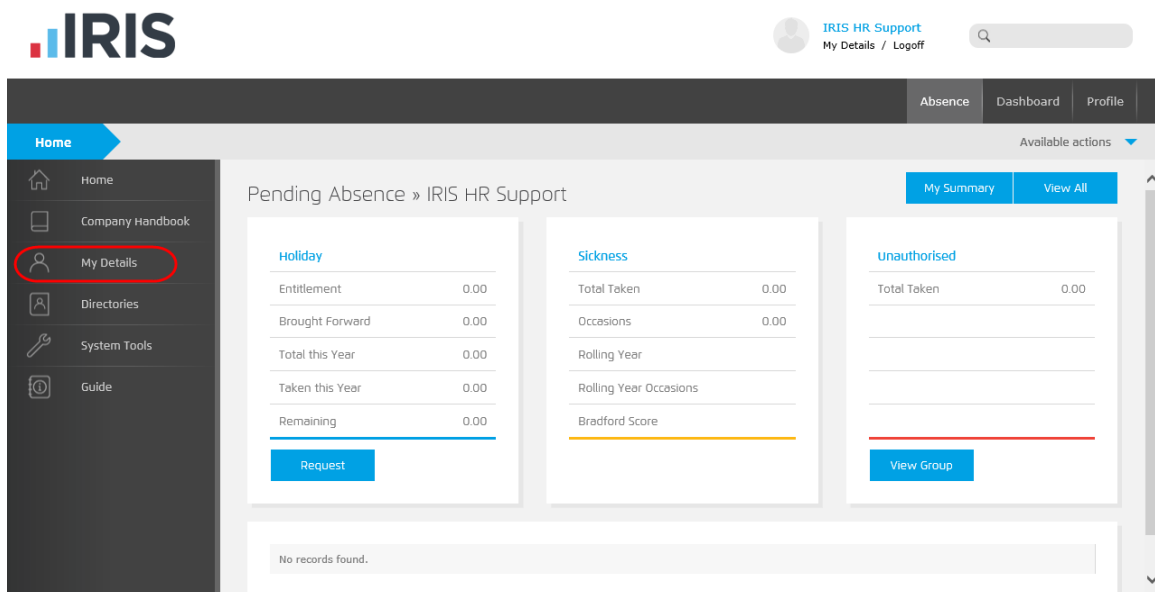


5. Click **Export**

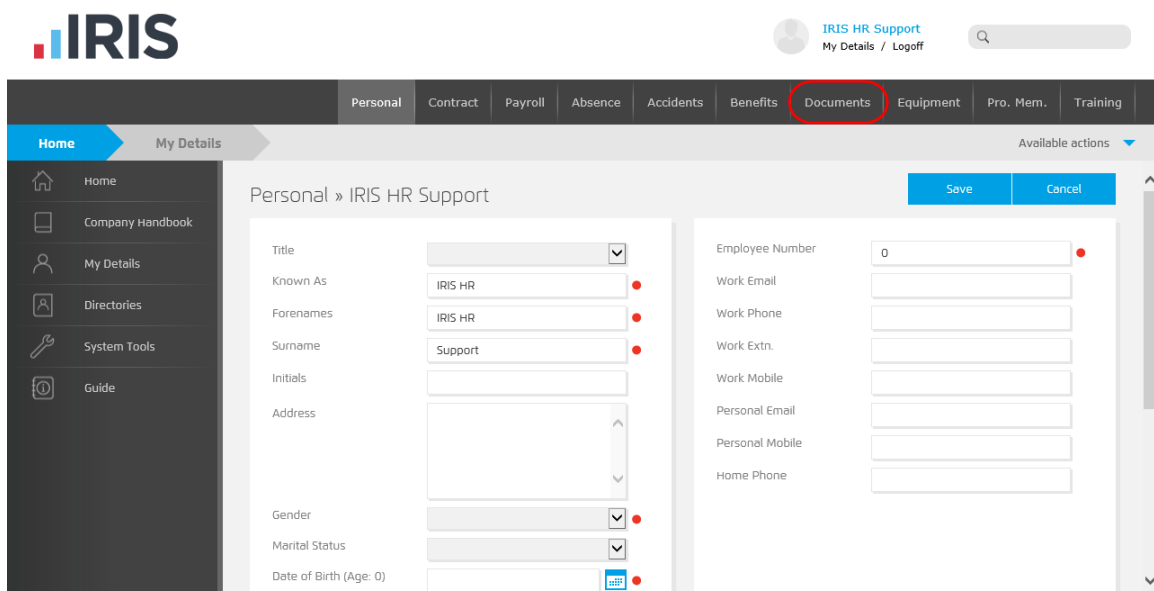
Send your employee data to us

Once you have exported your employees' data from IRIS Payroll, you need to upload the export file to the Support Team for them to create your employees in IRIS HR.

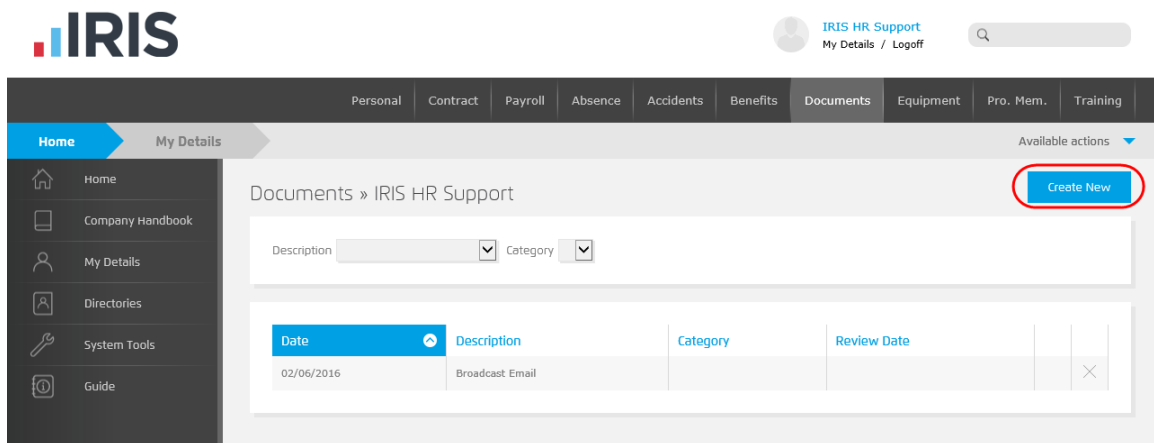
1. Log into IRIS HR using the details provided in your Welcome email
2. From the left-hand sidebar select **My Details**



3. From the tabs at the top of the screen, select **Documents**



4. Click **Create New**

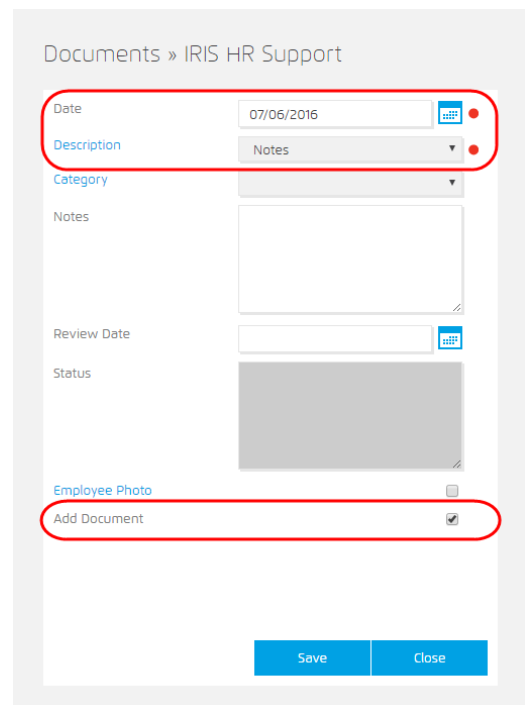


5. On the **Documents >>** window, complete the mandatory **Date** and **Description** fields

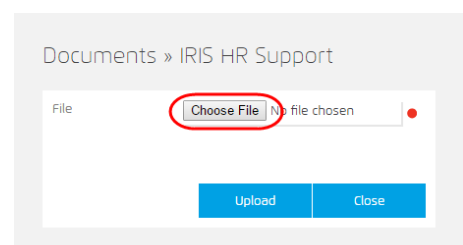
Date should be set to the date you're uploading the file and **Description** should be set to '**Notes**'

Tick **Add Document**

6. Click **Save**



7. On the **Documents >>** file upload screen, select **Choose File**



8. Browse to your payroll employees' export file. Once you have selected your export file, click **Open**

9. You will then be returned to the **Documents >>** file upload screen, click **Upload**

This uploads your payroll employees' export file to us. If for any reason you need to delete this file, you should click in the **X**

Don't forget to send us your employees holiday dates for the year

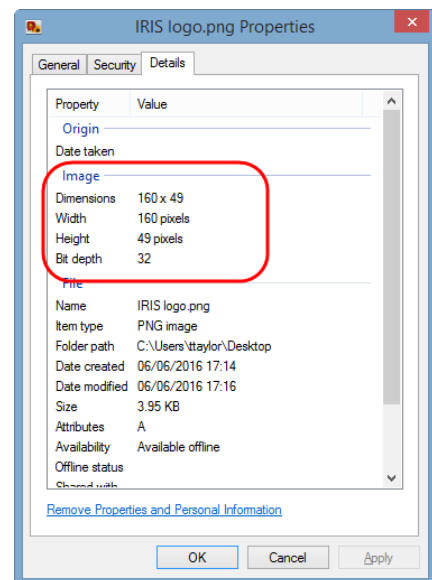
Send your company's branding requirements to us

You only need to complete these steps if you have chosen to have your company's branding on your IRIS HR system. If you don't require us to add your company's branding please go to [Email IRIS Support](#)

Your company logo must be a maximum of 160 x 65 pixels

To check the pixels on your company's logo:

Right click on the logo image, select **Properties** and then select the **Details** tab. The image's pixel size is in the **Image** section



We will take your branding colours from your company's logo.

Email IRIS Support - payroll employees uploaded and branding requirements

1. Once you have uploaded the export file of your payroll employees you should inform IRIS Support replying to the email received from the Support team
2. To send us your company's logo, you should reply to the email received from the Support team

Checks you should make after your IRIS HR system has been setup

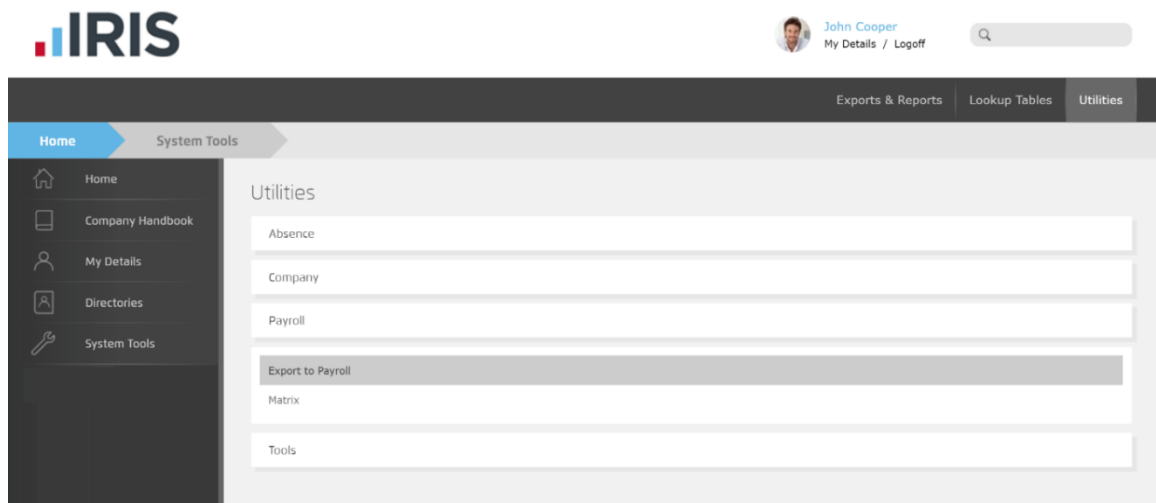
After payroll data has been imported into your new IRIS HR system, the employee's hours will be set as follows:

Band in payroll	Hours set in IRIS HR
A – Up to 15.99 hrs	15.99
B – 16.00-23.99 hrs	23.99
C – 24.00-29.99 hrs	29.99
D – 30 hrs or more	37.50
E – Other	0.00

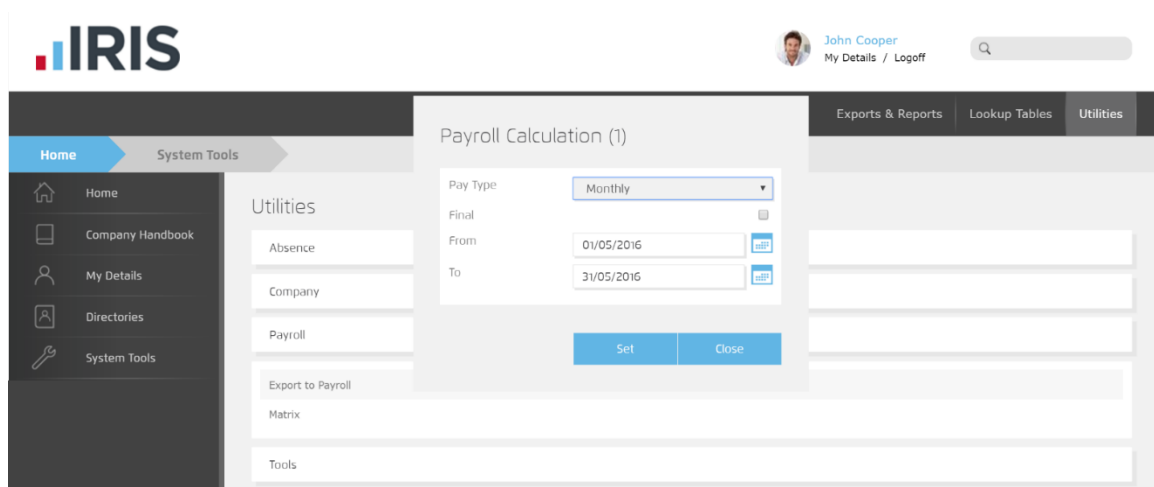
How to Import from IRIS HR to IRIS Payroll

From your IRIS HR software

1. Log into IRIS HR using the details provided in your Welcome email
2. It is essential to ensure the [mandatory employee fields](#) required by IRIS Payroll are completed prior to creating the export file
3. Go to **System Tools | Utilities | Payroll | Export to Payroll**



4. Choose the **Pay Type**



5. Enter the payroll **From** and **To** dates

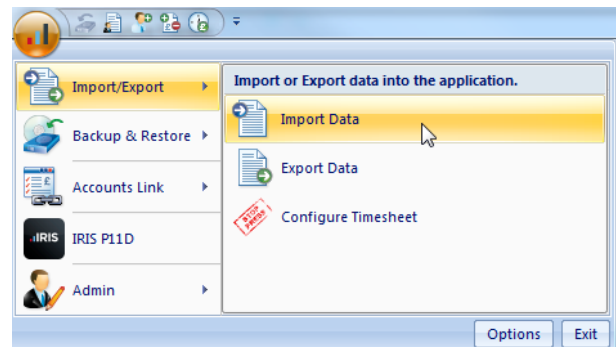
6. Click **Set**, this will create a zip file containing employee records called **IRIS HR Employee.csv**

- Using an unzipping utility, unzip **IRIS HR Employee.csv** and save to a location on your computer

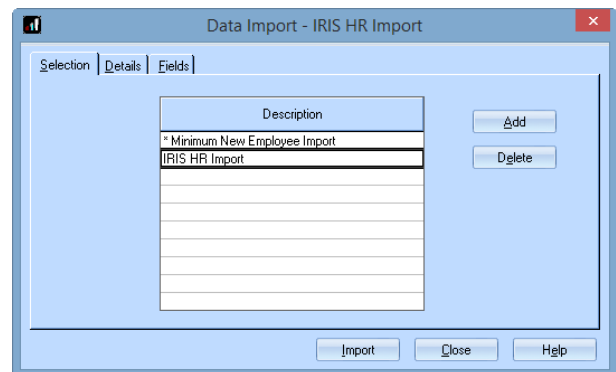
Please Note: there are other files in the zip file which can be ignored for integration with your payroll

From your IRIS Payroll Software

- Log into IRIS Payroll
- From the **Application Menu** select **Import/Export | Import Data**

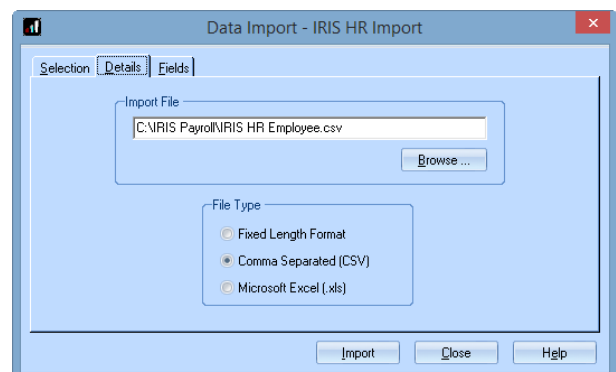


- On the **Selection** tab choose **IRIS HR Import**



- On the **Details** tab check the location in **Import File** is where you saved the export file from IRIS HR

- Set **File Type** as **Comma Separated (CSV)**



6. Click **Import**

Please Note: After you have imported data into a new IRIS Payroll company, prior to running your first payroll you need to ensure the following:

- For new starters, under **Employee | Starter Details**, choose the **Starting Declaration** from **A, B, C** or **P46 not completed**
- If an individual is not a new employee to the company, select the **Employee | Starter Details | Starter Status, Existing Employee (this is not a new employee to the company)**
- Under **Employee Details | Pay Elements | Loans**, enter Student Loan details, if applicable, for instance **Student Loan Plan Type** and **Start Date**
- After your first import, in **Employee Details | To-Dates**, ensure the **Previous Employment Gross Pay** and **Tax Paid** values are entered

Mandatory Fields

Field Names	Mandatory fields HR to Payroll	Mandatory fields Payroll to HR
Code	✓	✓
Sex		✓
Forename 1	✓	✓
Surname	✓	✓
Address Lines 1, 2, 3 and 4	✓ (required if no NI Number)	
Post Code	✓	
Date of Birth	✓ (required for RTI)	✓
Date Started	✓ (required for RTI)	✓
Date Left	✓ (if applicable)	
Director	✓ (if applicable)	
Director Start Period	✓ (if applicable)	
Hours Worked Per Week		✓
Tax Code	✓	
Tax Basis	✓	
Pay Period	✓	

Where do I find more help?

Our online Support Portal has detailed help with day-to-day tasks, such as Holidays and Sickness.

To access our Support Portal:

1. Log into IRIS HR using the details provided in your Welcome email
2. From the left-hand sidebar select **Guide**

The screenshot shows the IRIS HR Support Portal interface. The top navigation bar includes 'Absence', 'Dashboard', and 'Profile'. The left sidebar contains 'Home', 'Company Handbook', 'My Details', 'Directories', 'System Tools', and 'Guide', with 'Guide' highlighted by a red circle. The main content area displays 'Pending Absence » IRIS HR Support' and includes three summary cards: 'Holiday', 'Sickness', and 'Unauthorised'. The 'Holiday' card shows entitlement, brought forward, total, taken, and remaining amounts, along with a 'Request' button. The 'Sickness' card shows total taken, occasions, rolling year, rolling year occasions, and Bradford Score, with a 'View Group' button. The 'Unauthorised' card shows total taken and a 'View Group' button. A search bar and user profile are visible in the top right.

3. From the tabs at the top of the screen, select **Support System**

The screenshot shows the IRIS HR Support Portal interface with the 'Support System' tab highlighted in the top navigation bar. The left sidebar contains 'Home', 'Company Handbook', 'My Details', 'Directories', 'System Tools', and 'Guide'. The main content area displays 'Guide' and a message 'No records found.' The top navigation bar includes 'Guide' and 'Support System', with 'Support System' highlighted by a red circle. A search bar and user profile are visible in the top right.

4. In our Support Portal you can browse articles in the sections displayed. You can also search for keywords using the search bar in the upper right corner
5. To suggest a product enhancement:
 - Click **Submit a Request** button at the top to raise a new Support ticket
 - Click **My Requests** to view all Support tickets you have raised
 - Click **Home** to return to the main Support Portal screen

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