



# **IRIS HR and Payroll Guide**

June 2016



## Contents

<b>Introduction</b> .....	<b>3</b>
<b>Setting up your IRIS HR</b> .....	<b>3</b>
Add payroll employees to csv file.....	3
Send your employee data to us.....	3
Send your company's branding requirements to us .....	6
Email IRIS Support - payroll employees uploaded and branding requirements .....	6
<b>Mandatory Fields</b> .....	<b>7</b>
<b>Where do I find more help?</b> .....	<b>8</b>

## Introduction

This guide will give you an overview of how to initially setup your payroll employees in IRIS HR and where you can find further help.

## Setting up your IRIS HR

You only need to complete the setup process once.

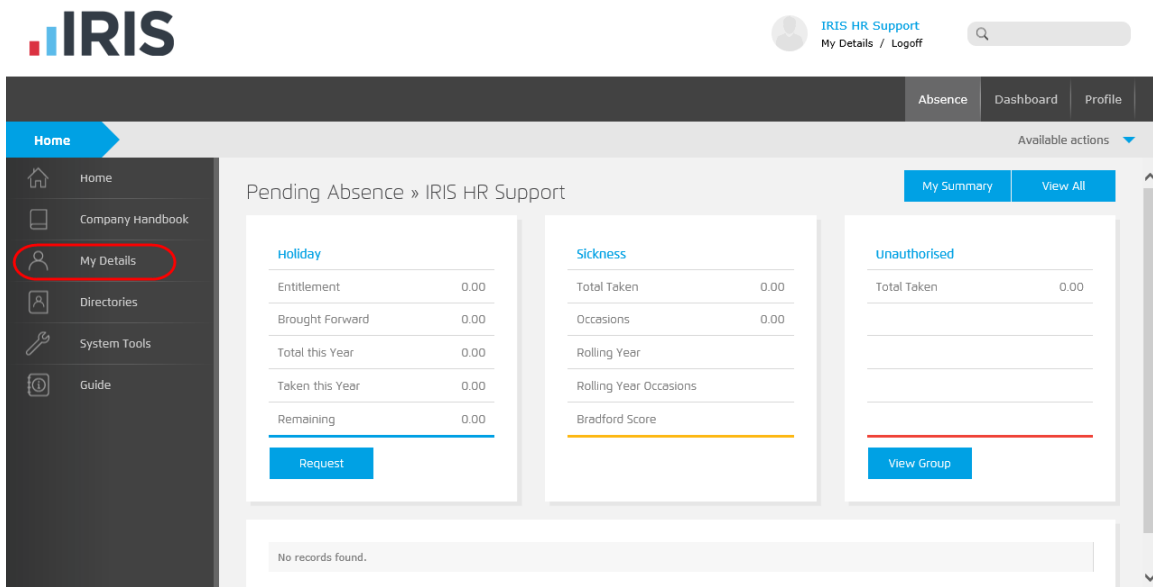
### Add payroll employees to csv file

It is essential to ensure the **mandatory employee fields** required by IRIS HR are completed. This must be done prior to adding your employees' data to the csv file attached to the email you received from the Support team

### Send your employee data to us

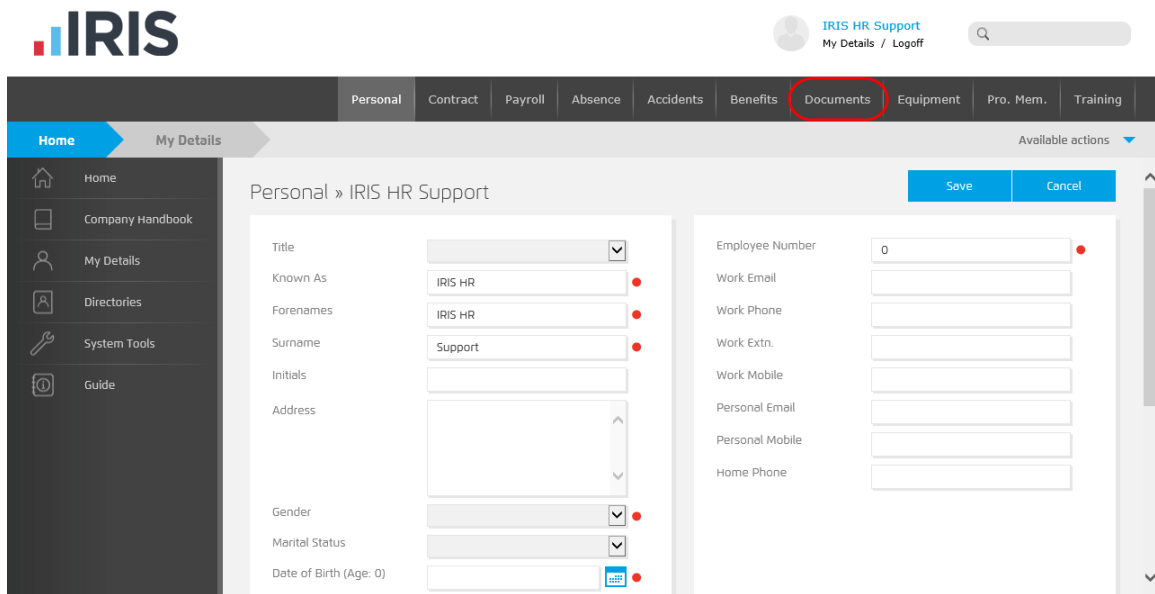
Once you have added your employees' data to the csv file, you need to upload that file to the Support Team for them to create your employees in IRIS HR.

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

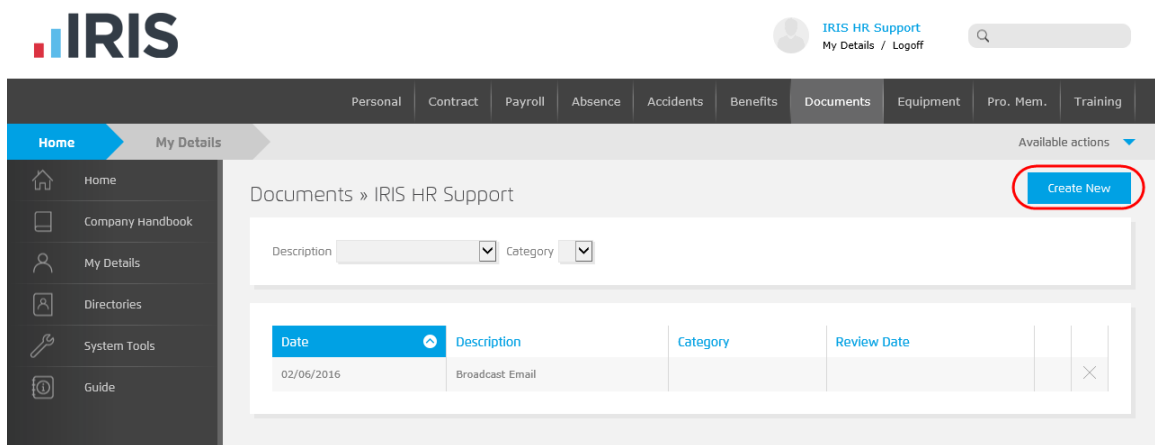


The screenshot shows the IRIS HR Support portal interface. At the top left is the IRIS logo. On the right, there is a user profile for 'IRIS HR Support' with a search bar. Below the navigation bar, the 'Home' menu is visible on the left, with 'My Details' circled in red. The main content area is titled 'Pending Absence » IRIS HR Support' and contains three summary cards: 'Holiday', 'Sickness', and 'Unauthorised'. Each card displays various metrics and a 'Request' or 'View Group' button. At the bottom, a message states 'No records found.'

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



4. Click **Create New**

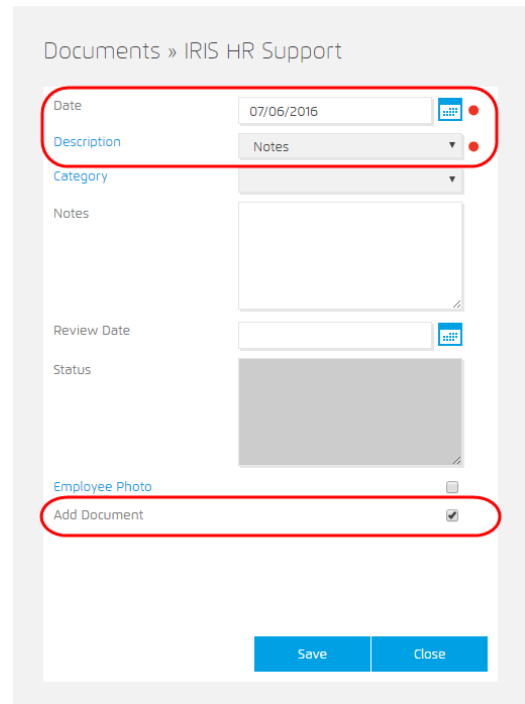


5. On the **Documents >>** window, complete the mandatory **Date** and **Description** fields

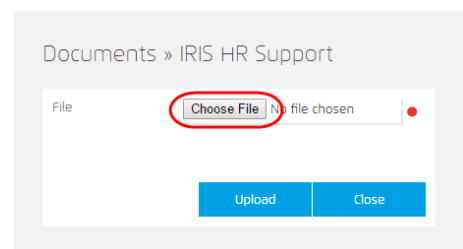
**Date** should be set to the date you're uploading the file and **Description** should be set to '**Notes**'

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**

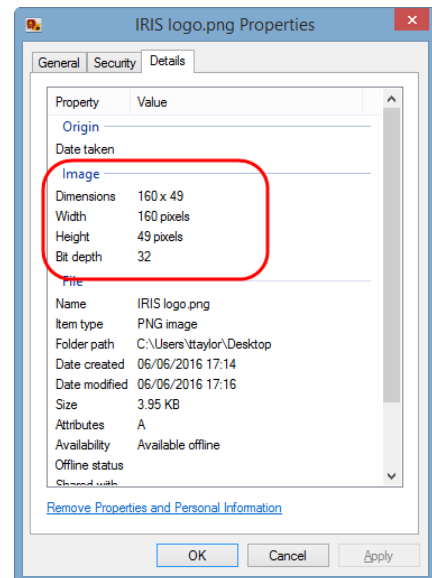
## Send your company's branding requirements to us

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

## Mandatory Fields

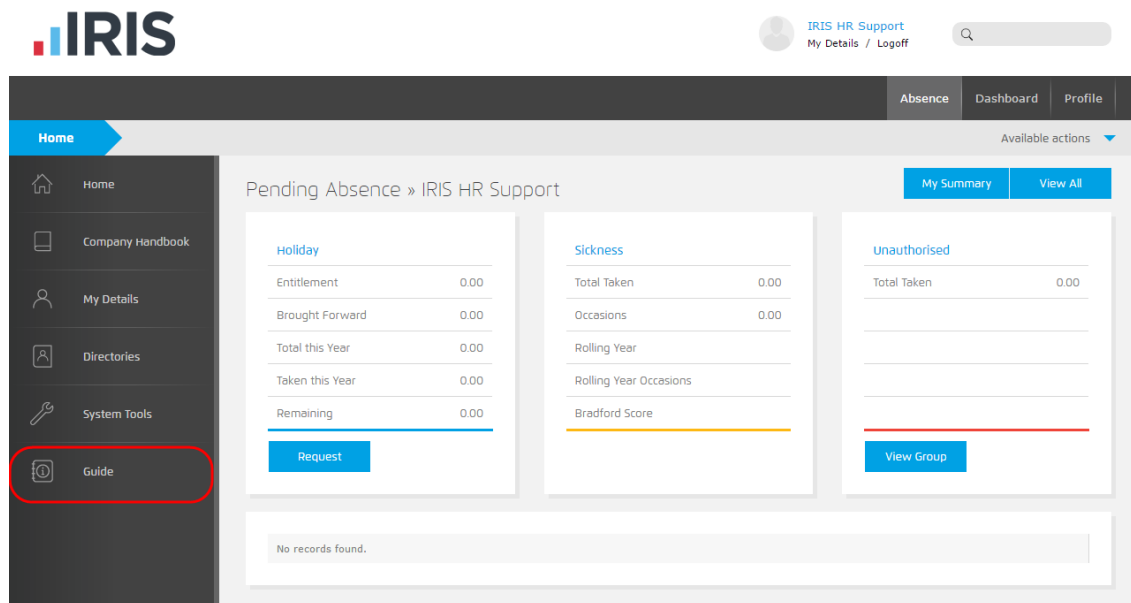
Field Names	Mandatory fields Payroll to HR
Code	✓
Sex	✓
Forename 1	✓
Surname	✓
Address Lines 1, 2, 3 and 4	
Post Code	
Date of Birth	✓
Date Started	✓
Date Left	
Director	
Director Start Period	
Hours Worked Per Week	✓
Tax Code	
Tax Basis	
Pay Period	

## Where do I find more help?

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

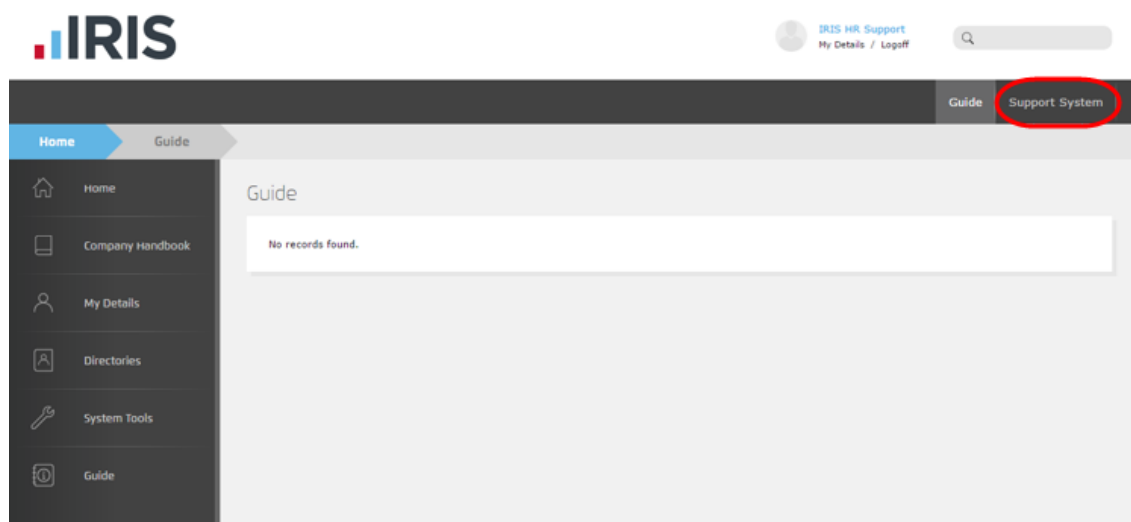
To access our Support Portal:

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 dashboard. The left sidebar contains navigation options: Home, Company Handbook, My Details, Directories, System Tools, and Guide. The 'Guide' option is highlighted with a red circle. The main content area displays 'Pending Absence » IRIS HR Support' with three summary cards: 'Holiday', 'Sickness', and 'Unauthorised'. Each card shows metrics such as Entitlement, Total Taken, Brought Forward, Total this Year, Taken this Year, Remaining, and Bradford Score. A 'Request' button is visible under the Holiday card, and a 'View Group' button is under the Unauthorised card. The top right corner shows 'IRIS HR Support My Details / Logoff' and a search bar.

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



The screenshot shows the IRIS HR Support Portal with the 'Support System' tab selected in the top navigation bar, highlighted with a red circle. The main content area displays 'Guide' with a message 'No records found.' The left sidebar contains navigation options: Home, Company Handbook, My Details, Directories, System Tools, and Guide. The top right corner shows 'IRIS HR Support My Details / Logoff' and a search bar.



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