



# IRIS Payroll Professional

A Guide to the IRIS HR Manager Link



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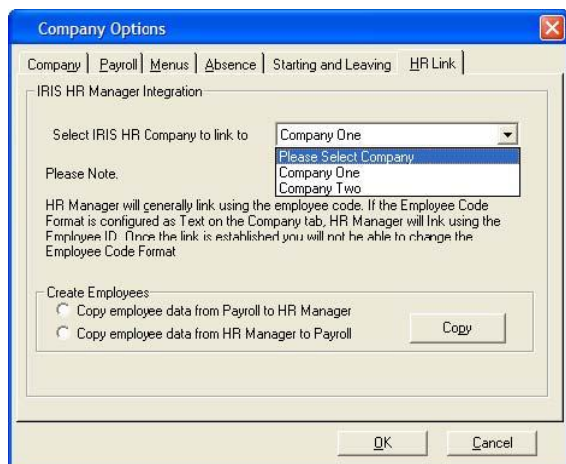
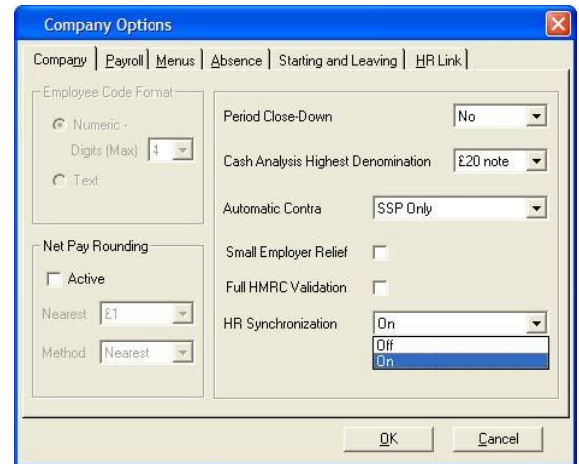
## How the link works

The dynamic link between **IRIS Payroll** 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 IRIS Payroll, 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



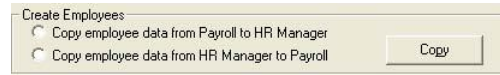
Repeat Steps 2 to 7 for each Company you want to link to IRIS HR Manager.

## Create Employees

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

### Copying employees from IRIS Payroll 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 IRIS Payroll
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 IRIS Payroll



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

1. Create a new company in IRIS Payroll with no employees
2. Using this guide, create the link in IRIS Payroll
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 IRIS Payroll and IRIS HR Manager is created, you can access each system from within the other.

### Opening IRIS HR Manager from within IRIS Payroll

In IRIS Payroll, 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 IRIS Payroll, 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 IRIS Payroll 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 IRIS Payroll 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 IRIS Payroll login details are not the same as for a HR company.

### Opening IRIS Payroll 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 IRIS Payroll 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 IRIS Payroll, the relevant payroll company will be opened. If IRIS Payroll is not running and the IRIS HR Manager username and password are not the same, then the IRIS Payroll 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 IRIS Payroll 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 IRIS Payroll 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 IRIS Payroll

## 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.  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

### **IRIS Payroll Basics**

Free, RTI compliant payroll software for companies with fewer than 10 employees

### **IRIS Payroll Business**

Intelligent, easy to use payroll software for smaller businesses

### **IRIS Payroll Professional**

Flexible payroll software for medium sized businesses

### **IRIS Bureau Payroll**

Intelligent management for multiple payrolls

### **IRIS OpenPayroll**

Cloud-based UK payroll software – accessible from anywhere on PC, Mac or tablet

### **IRIS P11D**

The easy way to complete employee expenses and benefits returns

### **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 5656

## HMRC online service helpdesk

Tel: 0300 200 3600

Fax: 0844 366 7828

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

## HMRC employer helpline

Tel: 0300 200 3200

## HMRC employer helpline (for new business)

Tel: 0300 200 3211

## Support

Tel: 0844 815 5671

Fax: 0844 815 5665

Email: [payrollpro@iris.co.uk](mailto:payrollpro@iris.co.uk)