HR Integration Guide

Earnie™

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Contents

www.iris.co.uk/customer

Welcome

This guide will give you an overview of how HR Integration works within the payroll software. You can read it straight through or just jump to the section you are interested in, using the links on the **Contents** page.
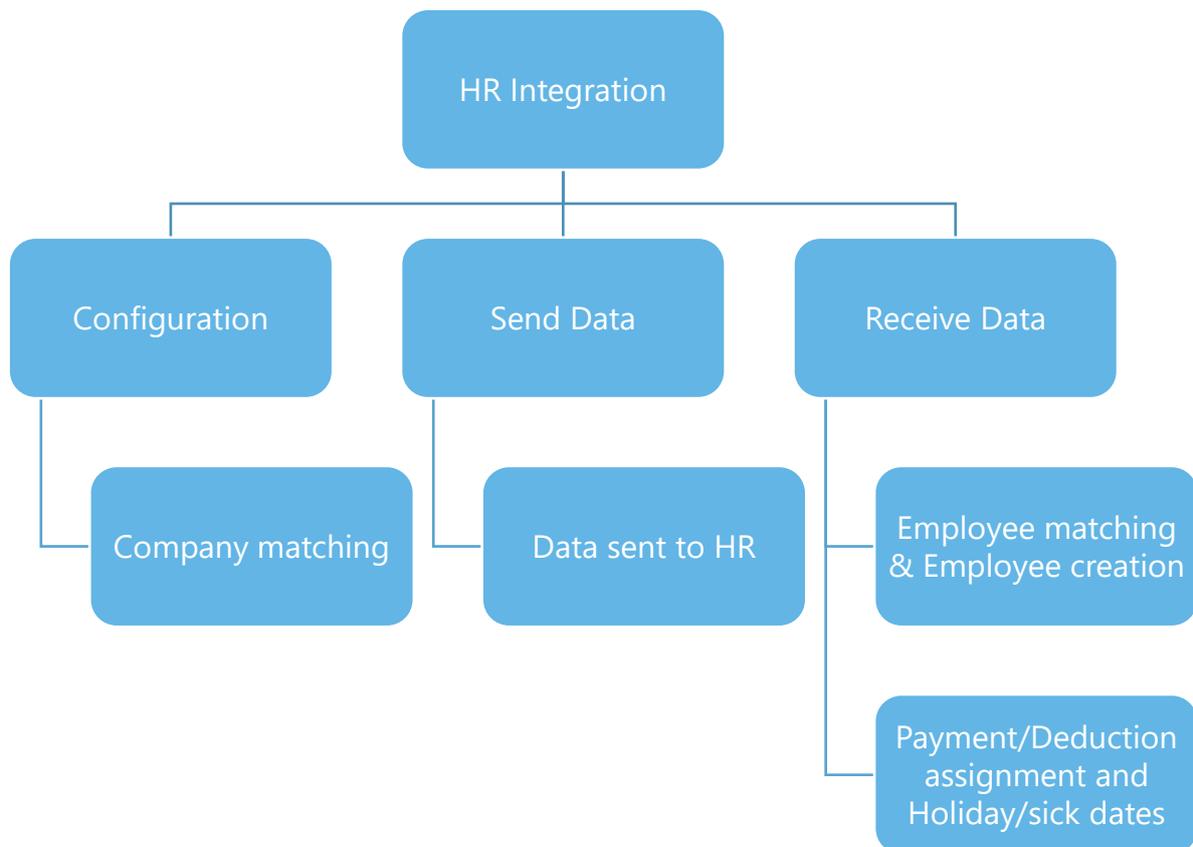
If text within the guide looks like **this** it is a link, which will take you to information on that topic.

Introduction

HR Integration is a revolutionary feature of the software, created to help reduce your workload, and free up your valuable time.

With an active HR account, you can send data to payroll and import payroll data into HR. Information entered into your HR system can be pulled through to payroll and used to pay employees. This time-saving feature removes the need to enter the same information twice, or to use cumbersome export and import processes.

Here is an overview of the process:

```
                        ┌─────────────────┐
                        │ HR Integration  │
                        └─────────────────┘
                                │
        ┌───────────────────────┼───────────────────────┐
┌───────────────┐       ┌───────────────┐       ┌───────────────┐
│ Configuration │       │   Send Data   │       │  Receive Data │
└───────────────┘       └───────────────┘       └───────────────┘
        │                       │                       │
┌────────────────┐     ┌────────────────┐      ┌──────────────────────────┐
│ Company matching│    │ Data sent to HR │      │ Employee matching        │
└────────────────┘     └────────────────┘      │ & Employee creation      │
                                               └──────────────────────────┘
                                                          │
                                               ┌──────────────────────────┐
                                               │ Payment/Deduction        │
                                               │ assignment and           │
                                               │ Holiday/sick dates       │
                                               └──────────────────────────┘
```

HR Integration

In the payroll software, on the main menu there is an **HR Integration** menu including the following options: **Configure**; **Send to HR**; **Get from HR**; **View & Import HR Data** and **View Links**.
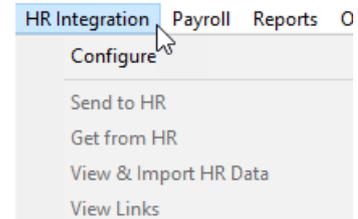
Configuration

**Please Note**: Before configuring HR Integration in payroll:

- you must have a company in HR for the payroll company to link to
- you must configure your **Payroll Calendar** for the whole tax year, including **Work Periods**
- you must check that each payment/deduction **Name** in payroll is unique, before sending data to HR

To create a new company in HR

As stated above, you must have a company in HR for your payroll company to link to. To create a company in HR:

1. Log into HR

2. Choose **System Tools**

3. Then, from the top right, select **Lookup Tables**

4. From the **Lookup Tables** screen click **Contract**

5. This opens a drop-down list, choose **Company**

6. From the **Company** screen, select **Create New**

7. Leave **Type** set to **Company**

8. In the **Lookup** field enter your **Company Name**

9. Click **Save** then **Close**

This company will now be available to select when linking payroll to HR.
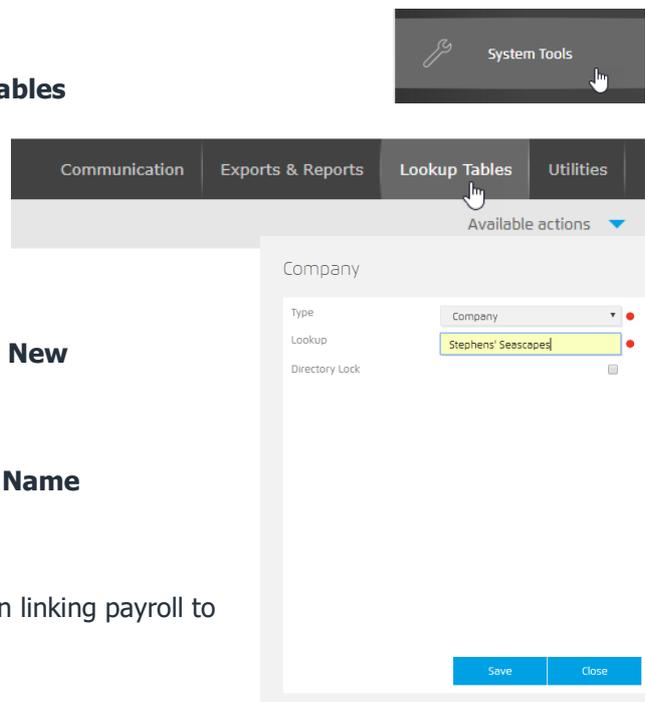
How to configure HR Integration in Payroll

You **must** complete the configuration process <u>before</u> using HR Integration for the first time. To do this follow these steps:

Login Details

1. Go to **HR Integration | Configure**

2. This will open the **HR Integration Configuration** screen

3. Enter your HR login credentials as the **Username** and **Password**

4. Tick **Show Password** if you want to confirm what you have entered

5. Click **OK**

6. If you only have one company in HR, the company will automatically link

7. If you have more than one HR company, the **HR Integration Company Selection** screen will be displayed

   a. From the drop-down list, select the HR company to link to payroll

   b. Choose the **HR Name (ID)** from the list

   c. Click **OK**
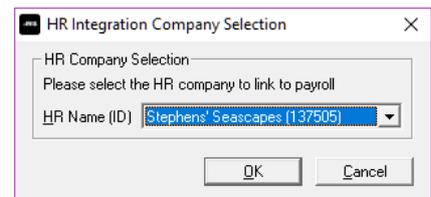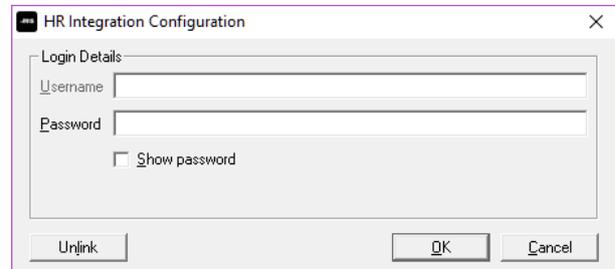
> Each HR Company only links to a single payroll company. Once you have linked a company in payroll to a company in HR you are unable to link that HR company to a different payroll company. HR has a mandatory company field when set to link to payroll.

Send to HR

Send to HR must be carried out for all companies <u>before</u> you can get data from HR.
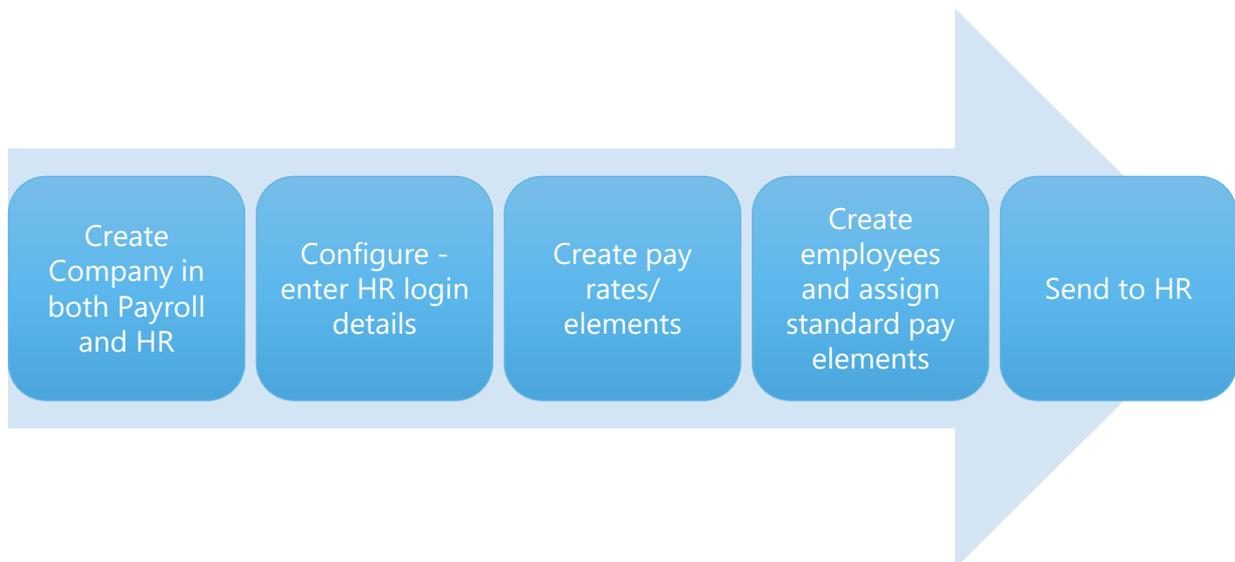
The **Send to HR** option can also be used to export <u>static data</u> to HR such as company pay element data (e.g. hourly rates and payments & deductions), employee details and pay elements (such as bonus payments and expenses) assigned to employees.

> You <u>must</u> check that each payment/deduction **Name** in payroll is unique, before sending data to HR
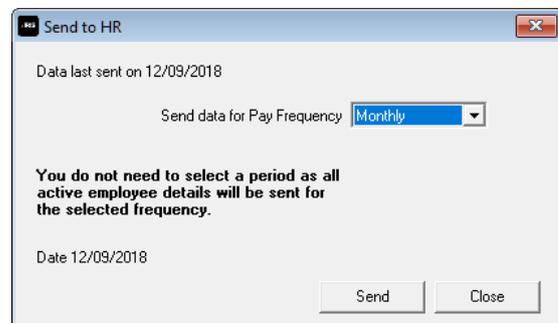
This section shows the steps you need to take:

- **If you are new to both payroll and HR**
- **If you have an existing company in payroll but you are new to HR**
- **If you have an existing company in HR but you are new to payroll**
- **If you have both payroll and HR with an existing company and employees**

If you are a new company to both payroll and HR

Create Company in both Payroll and HR → Configure - enter HR login details → Create pay rates/ elements → Create employees and assign standard pay elements → Send to HR

If you are setting up a new company having purchased both the payroll software and HR, you first need to create a company in payroll and HR. Then:

1. Log into payroll

2. In payroll go to **HR Integration | Configure** and enter your **HR login details**

3. Go to **Company | Alter Company Details | Pay Rates** section and create hourly rates

4. Go to **Company | Alter Payments / Deductions** and set up your standard pay elements

5. Create your employees and assign any standard pay elements

6. From the **HR Integration** menu select **Send to HR**

7. A message will be displayed, click **Send** to continue

8. Once complete, a message confirming data has been successfully sent to HR will be displayed

This process will:

- Send and create the pay elements definitions in HR
- Create the employees in HR, together with the standard pay elements assigned in payroll

If you have an existing company in payroll but you are new to HR

| Create company in HR | Configure - enter HR login details in payroll | Send to HR |

If you have a company in payroll but not HR, create a company in HR, then:

1. Log into payroll

2. In payroll go to **HR Integration | Configure** and enter your **HR login details**

3. From the **HR Integration** menu select **Send to HR**

4. A message will be displayed, click **Send** to continue

5. Once complete, a message confirming data has been successfully sent to HR will be displayed
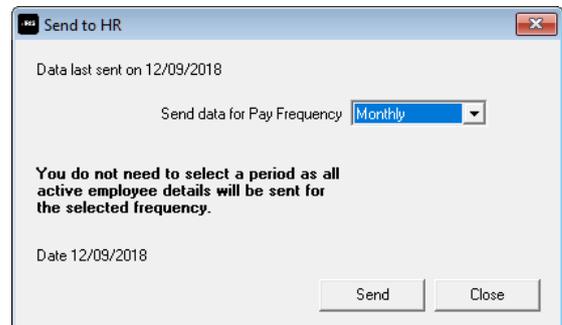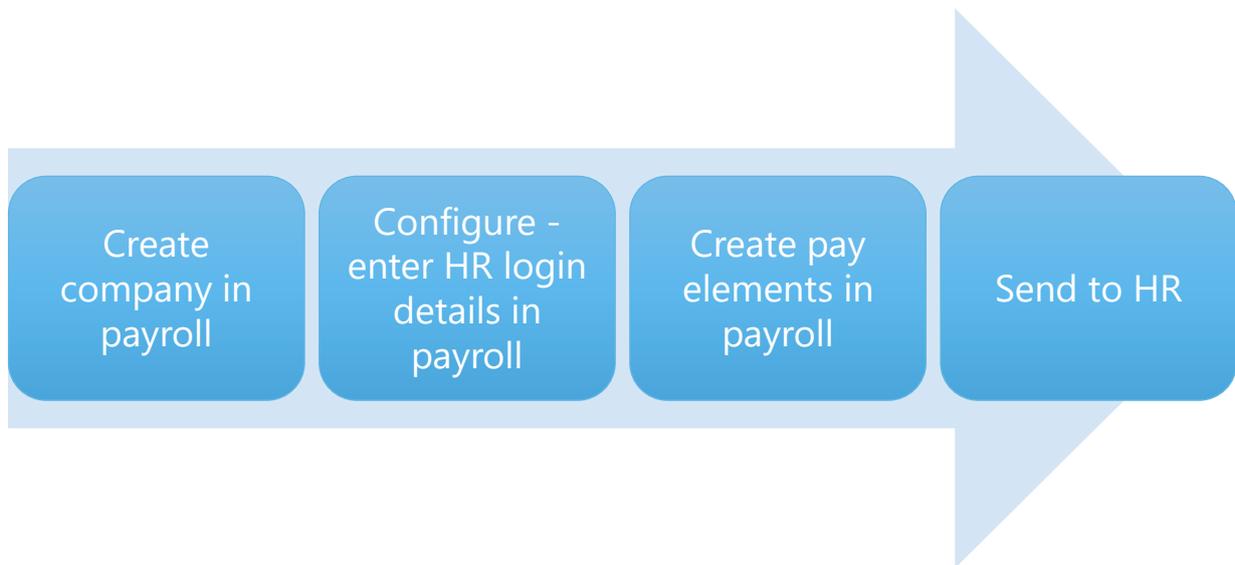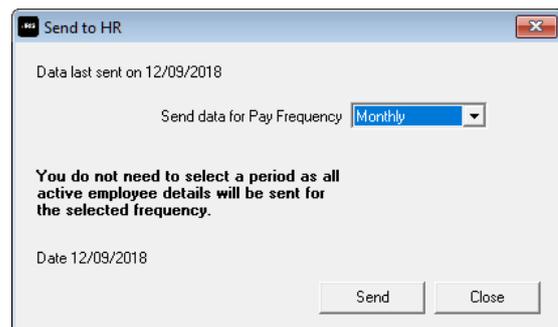
This process will:

- Send and create the pay elements definitions in HR
- Create the employees in HR, together with the standard pay elements assigned in payroll

If you have an existing company in HR but you are new to payroll

Create company in payroll → Configure - enter HR login details in payroll → Create pay elements in payroll → Send to HR

If you are creating a new company, having purchased the payroll software, once you have set up the company in payroll:

1. In payroll go to **HR Integration | Configure** and enter your **HR login details**

2. Go to **Company | Alter Company Details | Pay Rates** section and create hourly rates

3. Go to **Company | Alter Payments / Deductions** and set up your standard pay elements

4. From the **HR Integration** menu select **Send to HR**

5. A message will be displayed, click **Send** to continue

6. Once complete, a message confirming data has been successfully sent to HR will be displayed

7. In HR, ensure employees have the **Pay Group** field set

This process will:

- Send and create the pay elements definitions in HR

> **Please Note**: After performing the **Get from HR** process you need to assign any standard pay elements to employees in payroll

If you have both payroll and HR with an existing company and employees

1. Ensure all data in IRIS HR is up to date

2. Make a backup of your payroll data

3. In HR, select an employee and go to **Employee | Contract | Company**. Then select the relevant company for the employee. Next go to **Employee | Payroll | Pay Group** and choose the appropriate pay frequency
   For help with creating and assigning a **Pay Group**, see creating a Pay Group and assigning a Pay Group

4. Repeat step 3 for all employees in the HR system

5. In payroll, enter your HR login credentials as the **Username** and **Password**, see **Login Details**

6. Close down the last pay period you processed. To enable this option, go to **Company/Alter Company Options/Period Close-Down** and make sure the option is set to **Yes**, then click **OK**. To then close the period, go to **Payroll/Close Period**, select the relevant period and click **OK**

7. Go to **File/Change Payroll Date** and ensure the **Payroll Date** is set to the period you have just closed

8. Go to **HR Integration/Get from HR** and get the data from HR for the period you have just closed

9. After performing **Get from HR**, the retrieved data is listed on the **HR Integration/View & Import HR Data** screen

10. Highlight the Period and click **Validate**

11. Ignore any "**Error – Pay/Ded does not exist**" messages, however if other validation errors/warnings appear, amend these in HR and repeat step 7

12. When you are happy with the data from HR, go to **HR Integration/Get from HR** and select **Get Data** for the period you have just closed, with the **Final Request** option selected

13. Go to **HR Integration/View & Import HR Data,** highlight the period you have just closed and click **Import**, ignoring any "**Error – Pay/Ded does not exist"** messages

    - This will copy over and import all the employee details from HR into payroll without affecting the closed period's payroll

14. Repeat steps 3 to 10 for all pay frequencies in use

    - Remember that if a combination of weekly, 2-weekly and/or 4-weekly periods are in use, then the order of closing the periods and importing HR data should start at the lowest numbered week number. For example, if you have Weekly, 2-weekly and 4-weekly payrolls, employees have been paid up to and including week 7, then ensure week 4 is closed and import 4-weekly employees, followed by week 6 for 2-weekly and finally week 7 for weekly
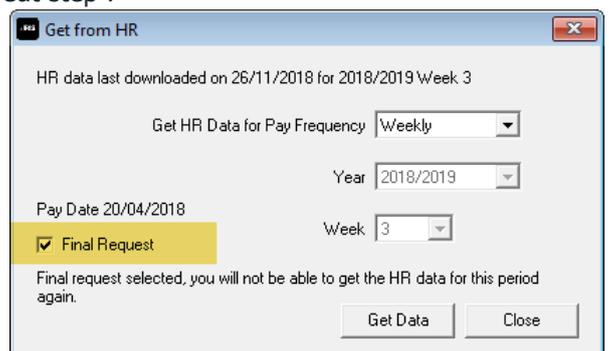
paid employees

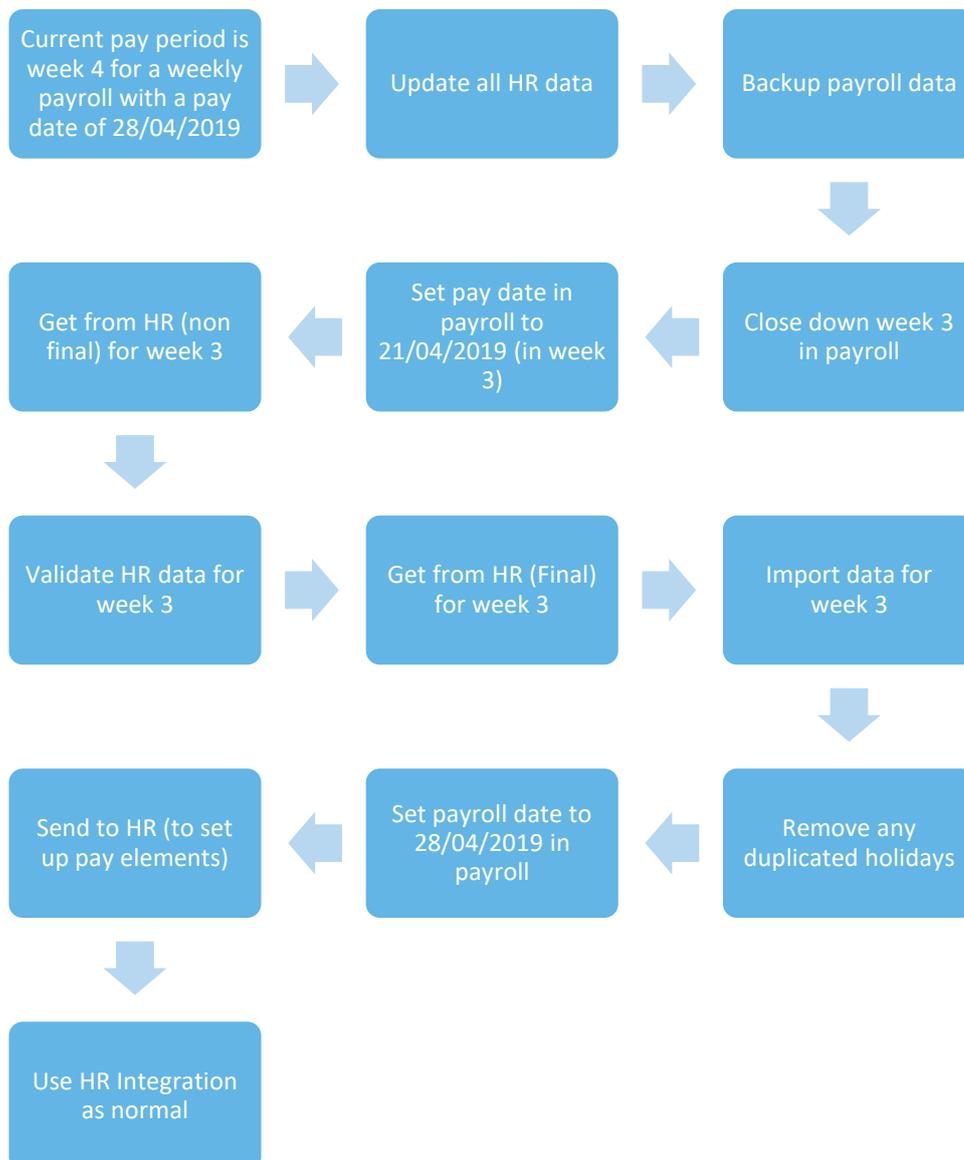15. Remove any duplicated holidays or holidays that have already been paid

16. Set pay date in payroll to the current period to be run

17. Send data to HR

   ▪ This will set up the pay elements in HR and assign them to employees

18. Continue to use HR integration in the normal manner

Example

Current pay period is week 4 for a weekly payroll with a pay date of 28/04/2019	Update all HR data	Backup payroll data
Get from HR (non final) for week 3	Set pay date in payroll to 21/04/2019 (in week 3)	Close down week 3 in payroll
Validate HR data for week 3	Get from HR (Final) for week 3	Import data for week 3
Send to HR (to set up pay elements)	Set payroll date to 28/04/2019 in payroll	Remove any duplicated holidays
Use HR Integration as normal		

Using HR Integration in Payroll

Get From HR

Once you perform the initial **Send to HR**, the payroll software will be able to retrieve and import data from the HR system.

The **Get from HR** screen displays the date HR data was last retrieved, the tax year, pay frequency and period number.

> When employees have been sent to HR but not matched to a HR employee in payroll, if you use the **Send to HR** process again, these individuals will not be included until they have been **matched**.
>
> Perform a **Get from HR** to match those employees.

To get data from HR:

1. From the **HR Integration** menu, select **Get from HR**

2. Select the relevant **Pay Frequency**

3. If you want to view the HR data but not import into payroll at this point, leave **Final Request** <u>unticked</u>. (If you are happy with the data and are ready import it into payroll tick **Final Request**)

4. Click **Get Data**

5. We recommend that you validate the data before import. See **View & Import Data**
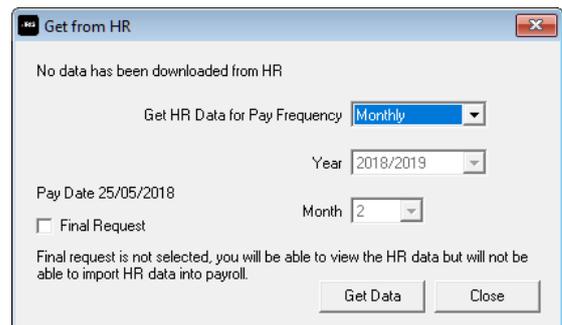
> Once data has been retrieved from HR marked as **Final Request**, <u>you cannot retrieve this period again</u>
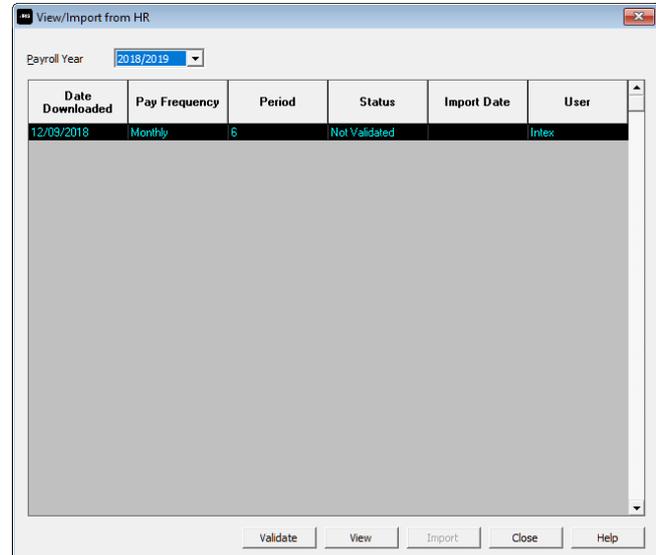
> **Please note**: any new pay elements must be created in payroll and the **Send to HR** process carried out before using the **Get Data** function

View & Import Data

After performing the **Get from HR** function, the retrieved data is listed on the **View & Import from HR** screen. This screen shows:

- **Date Downloaded**
- **Pay Frequency**
- **Period**
- **Status**
- **Import Date**
- **User**

If you choose to **Get from HR** without ticking **Final Request** the text in the fields will be red.

Validate

Prior to importing the data received from HR we recommend you **Validate** the data. The **Status** column will show '**not validated**' if:

- HR data has been retrieved without selecting **Final Request**, and
- HR data has not been validated

To validate the data:

1. From the **View/Import from HR** screen click **Validate**

    If the data is validated with no errors found, a **HR Data successfully validated** message will be displayed and the **Status** column will show **Validated**.

    If errors are found, a screen is displayed detailing the employee and the error, e.g.

2. Click **Print** to obtain a report detailing the errors, this could assist you when resolving the errors in HR

3. Click **Close** from this screen
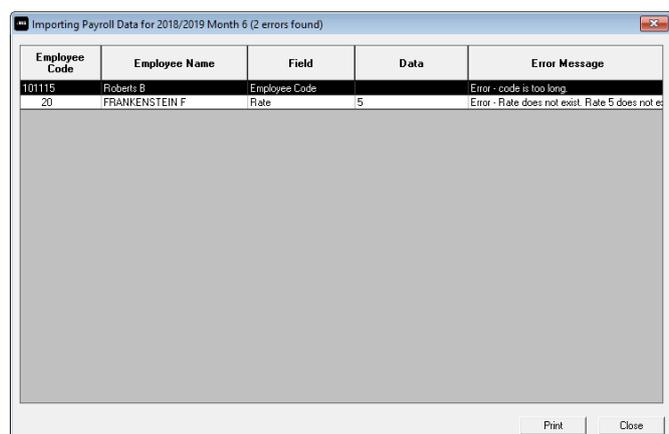
4. A prompt will be displayed advising you to make the required amendments and to perform the **Get from HR** process again. Alternatively, you can mark the HR data as valid and then **Get from HR** again with the **Final Request** option ticked. You may then need to address the validation errors once you have imported

5. To mark the HR Data as valid, click **Yes**, alternatively click **No** to return to the **View/Import** grid

> If you attempt to **Get Data from HR**, with **Final Request** selected, and have not validated the data, a warning message will be displayed advising you to **Validate** prior to importing into payroll. We would <u>strongly</u> recommend that you carry out the **Validate** process prior to importing however, you can click **Yes** on this message to proceed with the **Get Data from HR** with **Final Request** set.

To view the data received from HR:

1. Go to **Company | View & Import HR Data**

2. Highlight the period in the grid and click **View**

   The data is read-only; you can view the following tabs:

   - **Bulk Employee Amendments** – information here will change the standard amounts, such as salary, that appear each payroll for an employee
   - **Amend Existing Employees** – this section displays a card for each employee on the payroll, containing his or her Name, Code and Department
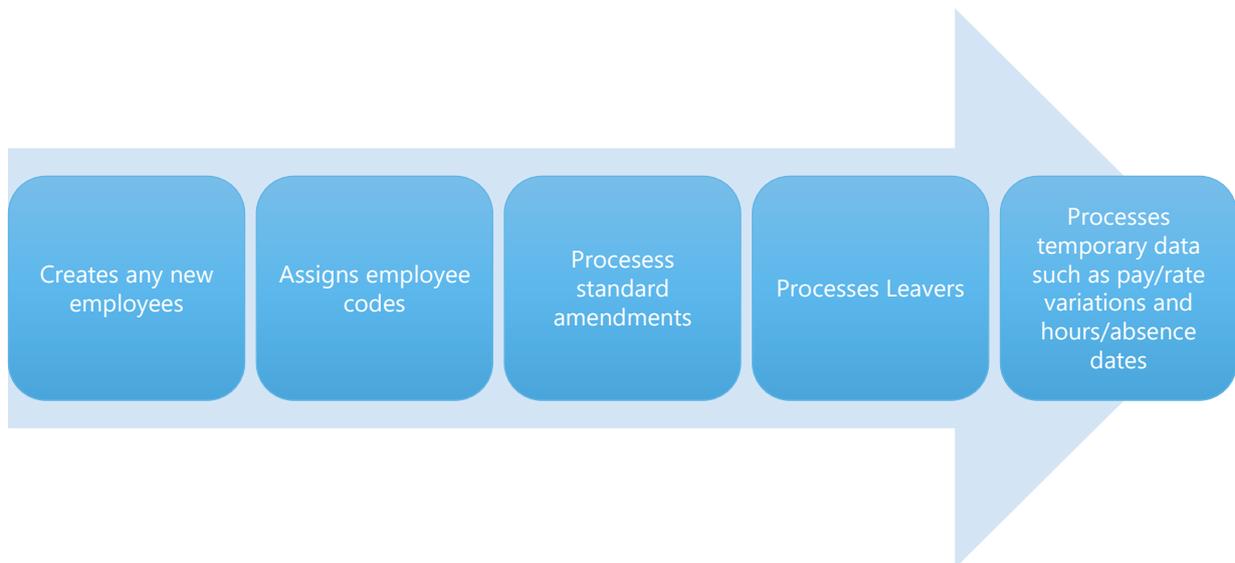   - **Payroll Entry** – this screen details payroll variations entered to appear for this pay period only

3. Click **Close** to return to the **View/Import from HR** screen

To get data from HR with Final Request selected:

Once you have validated the data received from HR and are ready to import:

1. Go to **HR Integration** | **Get from HR**

2. Tick **Final Request**

3. Click **Get Data**– a message will be displayed advising you will <u>not</u> be able to get the selected period's data from HR again

4. Select **Yes** to continue (**No** will return you to the **Get from HR screen**)

5. If successful, a confirmation message will be displayed

Importing the Data

| Creates any new employees | Assigns employee codes | Procesess standard amendments | Processes Leavers | Processes temporary data such as pay/rate variations and hours/absence dates |

When you are ready to import the data:

1. Go to **HR Integration | View & Import HR Data**

2. Highlight the period in the grid and click **Import**

3. Click **Yes** to the message asking if you are sure you want to import

Please Note: A warning is displayed if you attempt to import data for an employee who has already had the period calculated. If you click **Yes** to continue importing the data, you will need to calculate the payroll again for the individual. If there are any changes that are not temporary, you will need to undo the payroll for the employee and then calculate again.

After data has been imported, if there are any errors or warnings, such as a missing NI number, they will be displayed.

Employee Matching

When an employee is selected to be matched during the HR Integration import, if there is a mismatch between the Surname and/or the employee NI Number a warning is displayed. Employee matching is usually for new employees where different employee codes (numbers) may have been used in payroll and HR.

Example

If a HR Employee's NI number does not match the Payroll Employee's number a warning will be displayed. Clicking **Yes** on the warning will continue with the employee matching and import process and clicking **No** will return you to the employee matching screen.
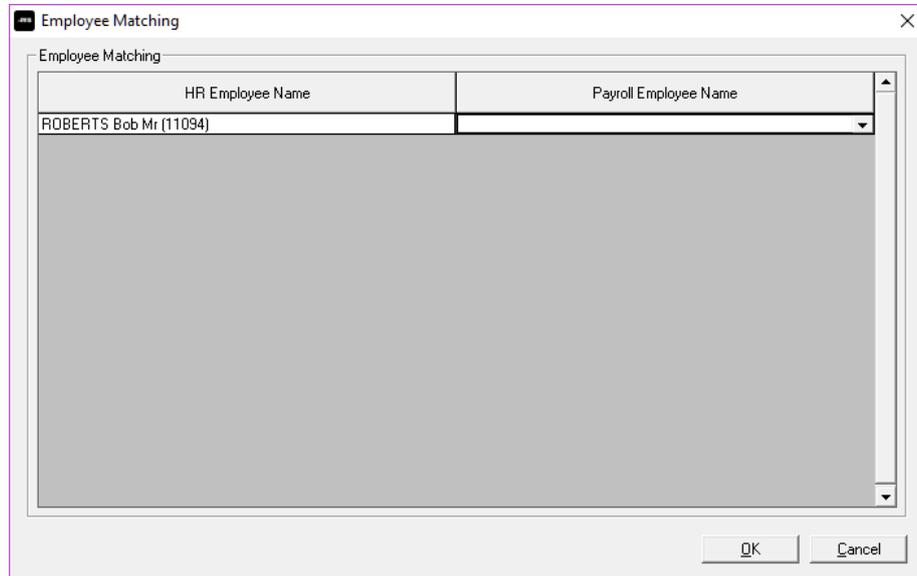
Payroll will attempt to match employees and will display suggested matches, however, if there is no proposed match between the **HR Employee Name** and the **Payroll Employee Name**, choose the relevant employee from the drop-down list to link with the **HR Employee Name**. If the employee is a new employee, choose the option **-New Employee-**. The drop-down list will not include already linked employees.

Importing Absence

Any holiday and sickness days are imported during the import process. Payroll will automatically calculate the amount of holiday pay and/or sickness due and will pay this in the current pay period (if applicable).

> The first time you are using HR Integration you will need to check holiday and sickness calculations manually as absence dates may have already been paid in a previous period. A warning message to this effect will be displayed, click **OK** to continue with the import process.

> **Please note**: Attachment of Earnings and SMP/SPP/SAP pay elements will not be transferred between HR and Payroll and these will need to be assigned manually in each system

Once the import is complete the **View/Import from HR** screen will be updated and will show:

- Status – Imported

- Import Date
- Import User

Once the import is complete you can continue with your usual payroll process i.e. **Do/Redo Payroll**. Once payroll is complete, to finish off the period we would advise that you **Send to HR**. this will ensure that the HR records are up to date with the payroll records.

If you are new to payroll, various user guides are available from the **Support | Help & Guides** section. Alternatively, if you need help with a particular screen in payroll, press the **F1** key on your keyboard to open **Help** directly on the current topic.

Frequently Asked Questions

Can I view links for employees?

Can I delete links for employees?

Can I enter absence in HR to transfer to payroll?

If I change the Start Date in HR will it change in payroll?

Why is the username field disabled when trying to enter my credentials?

Can I cancel the Send to HR process?

Can I amend details in payroll and send to HR?

How do I create a pay frequency in HR?

How do I enter a Pay Group for an employee in HR?

Do employee codes need to be unique in HR?

What happens if data is entered into IRIS HR and payroll at the same time?

How do create a Pay Group in HR?

How do I assign a Pay Group to an employee in HR?

Can I view links for employees?

Yes, from **HR Integration | View Links**. The screen displays the **HR ID** and **Payroll Name**.

Can I delete links for employees?

Yes, to delete a link for an employee:

1. Go to **HR Integration | View Links**

2. Choose the employee

3. Click **Delete**

4. To remove the link between payroll and HR click **Yes** to the warning message

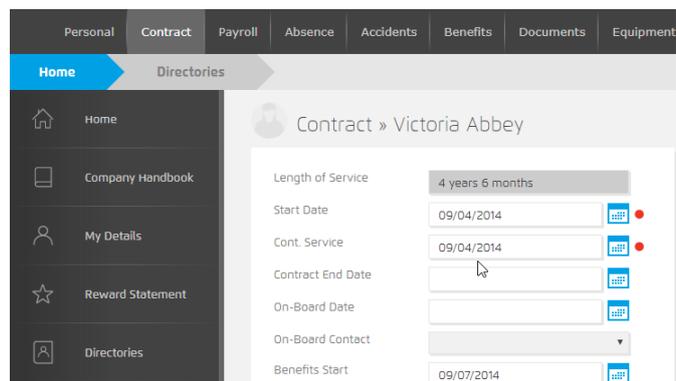### Can I enter absence in HR to transfer to payroll?

Yes, you can currently enter holidays and sickness **only**. Maternity, compassionate leave and unauthorised absence is not transferred to payroll.

If I change the Start Date in HR, will it change in payroll?

No, to change the **Start Date** in Payroll for an employee you need to amend the **Cont. Service** field in HR.

To edit the Cont. Service field:

1. In HR, select **Directories** and then choose the employee

2. Click the **Edit** icon

3. Go to the **Contract** tab

4. Amend the **Cont. Service** field

5. Click **Save**

Why is the username field disabled when trying to enter my credentials?

The **Username** field will be disabled if this has been previously entered, saved and linked to an HR Company. If this needs to be changed, you will need to unlink the company.

If the **Username** and **Password** credentials are already stored, the username will be displayed and the password field will be shown as *'s. Click **Show Password** to see the details.

Click **Unlink** to remove the following:

- **Username** and **Password** from the **HR Integration Configuration** screen
- **HR Company ID** from the payroll company and the **HR company name**
- **HR ID link** from all employees in the payroll company

A confirmation message will be displayed when you have successfully unlinked a company.

Can I cancel the Send to HR process?

A progress bar will be displayed during the "send" process. Clicking **Cancel** will pause the process and a message will be displayed advising that all data may have been sent to the HR system and advising you to check HR for the changes. You will also be asked if you want to cancel sending the data, click **Yes** to stop the process or **No** to resume sending the data to HR.

### Can I amend details in payroll and send to HR?

Yes, you can make changes to an employee's details in payroll and then send the changes from payroll to HR. In this example, we will change an employee's address and add a monthly bonus:

1. Log into payroll

2. Select the employee and in **Employee Details**, change their address

3. In **Employee | Alter Current Employee | Employee details | Pay Deds**, add a new bonus for an employee

4. From the **HR Integration** menu choose **Send to HR**

5. Click **Yes** to the message to confirm

How do I create a pay frequency in HR?

1. In HR go to **System Tools**

2. Choose **Lookup Tables**

3. Click **Payroll** and from the drop-down select **Pay Type**

4. Select **Create New**

5. From the **Type** drop-down select **Pay Type**

6. Next to **Lookup** enter your pay frequency i.e. Weekly

7. Enter **Pay Period Frequency** – this is how many periods there are in the year for the selected Lookup:

   - Weekly   =   52
   - 2 weekly   =   26
   - Monthly   =   12
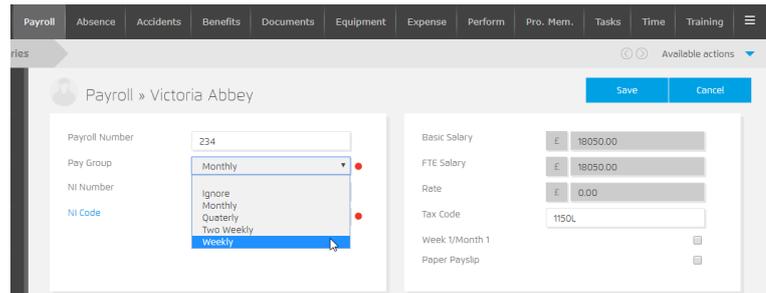   - 4 weekly   =   13
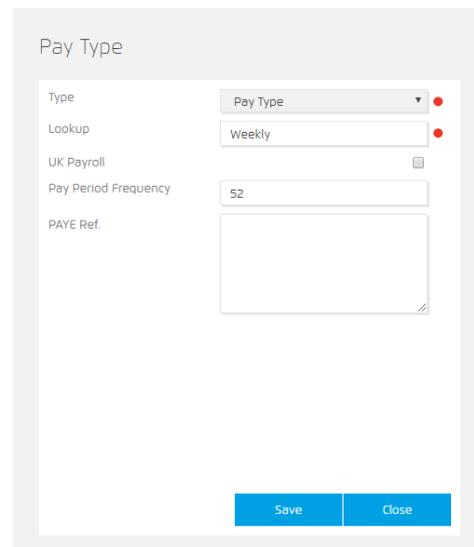
How do I enter a Pay Group for an employee in HR?

1. In HR go to **Directories**

2. Choose the employee and click the edit icon

3. Select the **Payroll** tab

4. Choose the required frequency from the **Pay Group** drop-down

5. Click **Save**


Do employee numbers need to be unique in HR?

Yes, employee numbers in HR must always be unique. If you have multiple companies in payroll, you will need to ensure that there are no employees with the same number.

What happens if data is entered into IRIS HR and payroll at the same time?

Care needs to be taken in this situation. If the payroll user amends a record in HR, and another user amends the same record in payroll, some of the data may be lost when that record is sent between systems. We recommend that work is completed in IRIS HR before continuing in payroll.

How do I create a Pay Group in HR?

1. In HR, go to **System Tools | Lookup Tables | Payroll | Pay Type**

2. On the **Pay Type** screen, click **Create New**. This opens another **Pay Type** screen

3. Enter the pay frequency in the **Lookup** field

4. Complete the remaining fields, if required

5. Click **Save** and then **Close**
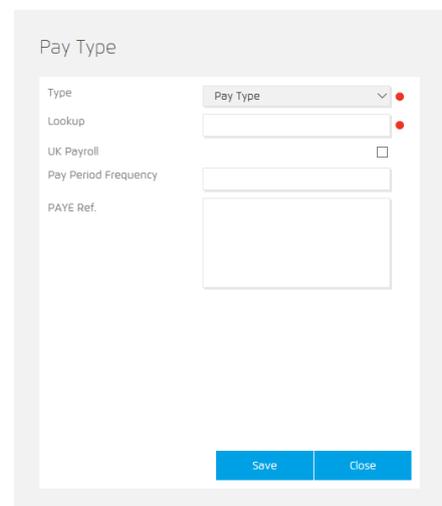
How do I assign a Pay Group to an employee in HR?

1. In HR, choose the employee

2. Go to **Employee | Payroll** and select the **Pay Group**
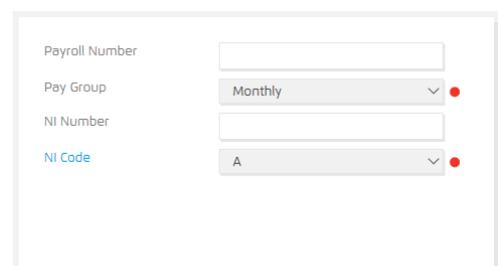
Additional Software and Services Available

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 Fax:　0844 366 7828 Email:　helpdesk@ir-efile.gov.uk	Tel:　0300 200 3200 Tel:　0300 200 3211 (new business)

Contact Sales (including stationery sales)

For IRIS Payrolls	For Earnie Payrolls
Tel:　0344 815 5700 Email:　sales@iris.co.uk	Tel:　0344 815 5677 Email:　earniesales@iris.co.uk

Contact support

Your Product	Phone	E-mail
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