IRIS OpenPayroll Getting Started Guide

A quick guide to help you make the most of the core features in IRIS OpenPayroll.

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Your Account

To use IRIS OpenPayroll, you will need to setup an Account. Visit our website and click Sign Up or Free Trial. You will be able to use all the features of IRIS OpenPayroll for free for two tax months.

Sign up

To sign up for free, visit the sign up page and enter your email address - you'll use your email address to login later. After signing up, we'll send you an email to activate your account.

Activate

Check your email – including your spam or junk folders. If you do not get an email within 10 minutes please make sure you are receiving emails, check on the sign up page for the "Resend activation email link" or call us for help. Click the link in the email to activate your account.

You will be asked to set a password for your account. IRIS OpenPayroll insists on a strong password - to protect your sensitive payroll data - so you should use letters, numbers and special characters (not a letter or a number) to make your password hard to crack.

Sign in

Enter your email address and password. If you forget your password you can request a new password to be sent to your email address.

Sign out

We recommend you always sign out of IRIS OpenPayroll when you finish using it. This helps to prevent unauthorised access from your machine. A logout link is available from every page of the system in the top right-hand corner. Click the gear icon next to your name to open the My Profile and Logout menu.
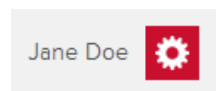
My Profile

The My Profile and Logout menu in the top right-hand corner of each page lets you update your personal information associated with your account as well as your access details. Go here to change your password or the email address you use to sign in.
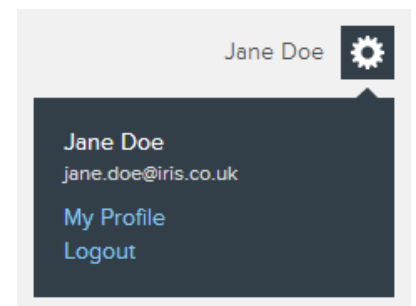
Companies

When you login for the first time you can select our Demo Company or create your own from scratch. The Demo Company contains lots of data so you can get a taste for IRIS OpenPayroll without having to enter any details yourself.

Throughout IRIS OpenPayroll red areas perform actions, such as: Add New Company
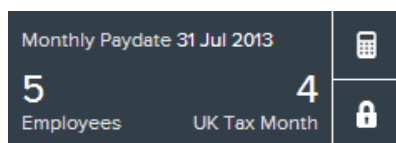
Setup Company

IRIS OpenPayroll will guide you through a series of steps but you can skip some and fill in the blanks later. The blue areas show help and information:

 New Company Setup
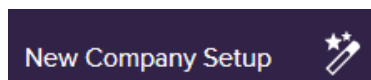
Important fields to enter are the Pay Dates for your current weekly and/or monthly payrolls. For payroll calculations to be correct please say if your Company is eligible for Small Employers Relief. For RTI filing you can choose to let IRIS OpenPayroll file for you or you can enter your own HMRC Online Filing Credentials.

You can return to the Company area any time using the Company menu or enter another company with the Add New action. Try the Company Dashboard to get an overview of what's going on – note that black areas jump to other screens, such as Lock Pay Date.

Monthly Paydate 31 Jul 2013
5 Employees   4 UK Tax Month

Options

- If you pay employees by 'Electronic Transfer' then pick an electronic payment type so that IRIS OpenPayroll can make a BACS file for you to download.

- If you are moving to IRIS OpenPayroll during the Tax Year then enter Opening Balances so that IRIS OpenPayroll knows the Year To Date figures from your previous payroll system.

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Employees

After setting up a company you need to add an employee. You can click the Employees menu and the Add New Employee action at any time.

New Employee

IRIS OpenPayroll will guide you through a series of steps but you can skip some and fill in the blanks later. Important fields to get right are on the first step but you must also enter the NI Number, NI Category and Pay Cycle (weekly or monthly).

You can return to the Employee area any time using the Employee menu or enter another employee with the Add New action.

 Add New Employee

Try the Employee Dashboard to get a summary and use further actions.

Employee Pay

The Salary and Hourly Rate will be entered on the Payslip later.

Options

- If you have paid the employee using your previous payroll system then enter Opening Balances so that IRIS OpenPayroll knows what happened earlier in the Tax Year.

- If the employee does not work Monday to Friday then use the Work Pattern screen to change the working days.

- If the employee has sickness absence, Statutory Leave, or Earnings Orders then pick an option from the menu and enter the details. IRIS OpenPayroll will automatically add the relevant item to the employee's payslip.

Payroll

Now that you have a company with a weekly or monthly Pay Date, you can create a Payslip for each employee by clicking the Payroll menu.

First of all, IRIS OpenPayroll displays a list of Employees and tells you

- the Net Pay on the current Payslip, or

- that some more employee details are required before you can proceed, or

- no Payslip has been entered yet!

Just click on a line to see the full Payslip.

Payslips

IRIS OpenPayroll lets you build the payslip on the screen by adding Items:

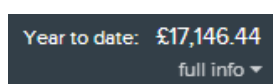You can pick items such as Salary or Time and Half:

Other items such as Tax and Statutory Sick Pay will be added automatically.

The Net Pay and Year To Date figures are updated so you always see the actual payslip that the employee will get. Click the box at the top right for more information:

Rates

An employee has an hourly, weekly and monthly Rate of pay that is set automatically from the items you enter on the payslip. For example, if an employee works 40 hours a week and you enter a weekly Wage of £400 then IRIS OpenPayroll sets the Hourly Rate to £10. You can edit the Rates if you like.

Items

When you pick an item IRIS OpenPayroll will set a default Value for you. For example, if the Hourly Rate is £10 and you enter 5 hours of Overtime then the Value will be £50.

You can change the text for any payslip item but the following fields are available to some items only:

- Repeat – Lets the item repeat automatically and stop at a specified End Period.

- Units – The number of hours, days or weeks.

- Times By – A multiplier to change the Value up or down

If you cannot find an item that exactly meets your needs just use the nearest one and change the text.

Periods

You can switch to previous Periods (to see old payslips) or move to future Periods (to enter Items in advance) by using this handy Period Picker:

Approve

Click Approve Payslip when you are happy with it – this prevents any Employee changes from affecting the payslip:

Finalise Pay Date

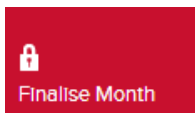When all the payslips have been approved you can finish the entire Pay Date by clicking Finalise from the Payslips & Periods menu again:

IRIS OpenPayroll will warn you of any problems before letting you finalise the Pay Date.

When the Pay Date is finalised you can print payslips, produce reports and download BACS files. You can come back and reprint Payslips for any Period at any time by clicking the Finalised Periods tab.

RTI

When the Pay Date is locked IRIS OpenPayroll will submit all RTI returns automatically, online and on time. You don't have to lift a finger. Use the Payroll Online Filing screen to check the status of your RTI submissions.

RTI Filing Logs

RTI filing submissions Phroot has made for you. View full submission detail by clicking a log line.

Logs In Year				«	2013/2014	»
Type	Period	Filed	Processed		Status	Employees
FPS	M1	22 Apr 2013	22 Apr 2013		OK	5
EPS	M1	22 Apr 2013	22 Apr 2013		OK	0

HMRC

You are responsible for paying your employees their Net Pay and paying HMRC for the tax and NICs you have deducted on the payslips plus the employer NICs that you are liable for. You can go to the Company menu and select Payments and Receipts to see how much is due to HMRC.

You should pay HMRC before the 19th of the next month. For a more detailed breakdown you can generate detailed reports.

Government Payments & Receipts

Manage and view payments to, and receipts from, Government bodies, for example, payment of taxes to and receipts from HMRC for statutory funding.

Payments			«	2013/2014	»
Tax Month	Total Due	Date Paid			Action
M1	£15,634.30				Mark as Paid

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Reports

When you have entered some employee and payroll data you can produce reports to list, summarise and analyse what has been going on. Just press the reports menu.

Payroll

When you pick a Payroll report you can get data for one or more Periods:

☑	Month	3	28 Jun 2013
☑	Month	2	31 May 2013
☑	Month	1	30 Apr 2013

The Payslip Crosstab Report analyses payroll by headings such as Basic, Tax and Net as shown:

Payroll Crosstab Report

06 Apr 2013 - 05 Jul 2013 Date Range	3 Paydates	6 Employees

Employer Contributions: Show Hide   Export Options ▼

Employee	Period	Basic	Adjustment	Benefits	Expenses	Funds	Lumps	Orders	Schemes	Time	Tax	NIC	Gross	Net
David Michaels	M1	548.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	109.60	0.00	548.36	438.76
	M2	642.15	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	128.40	0.00	642.15	513.75
	M3	520.14	0.00	0.00	0.00	0.00	100.00	0.00	0.00	0.00	124.00	0.00	620.14	496.14
Subtotals		1,710.65	0.00	0.00	0.00	0.00	100.00	0.00	0.00	0.00	362.00	0.00	1,810.65	1,448.65
John Leaver	M1	1,500.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	675.00	88.10	1,500.00	736.90
	M2	570.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	114.00	0.00	570.00	456.00
Subtotals		2,070.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	789.00	88.10	2,070.00	1,192.90

You can play with reports without breaking anything so feel free to experiment.

Statutory

When an employee leaves you can print a P45 leaver statement from here.

Employee

These reports generate lists of employees and their details.

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