

# IRIS Bureau Payroll

Getting Started Tutorial -  
Report Manager

18/02/2014



## Important Note:

## Using the Demonstration Company

You will be using the **Demonstration Company** for this tutorial.

To open the Demonstration Company, highlight **Demonstration Company** from the **Clients** screen in the **Bureau Dashboard** then click **Open**.

Client No.	Client Name	PAYE Ref No	Payment Frequency	Tax Year	Company Status	Direct
0	Demonstration Company	002/Q1	Mixed	2014/2015	Live	No
1	adfasdfasdf		Monthly	2014/2015	Live	No

**Client Details**

**Address**  
Demonstration Company  
Diamond Court  
Preston Farm Business Park  
Stockton-on-Tees  
Cleveland  
TS18 3TP

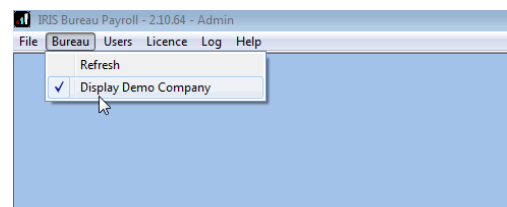
**Payment Frequencies**  
Weekly, Monthly

**HMRC Information**  
Tax Account No: 002PV92746639  
Tax District: Middlesbrough1  
Accounts Office:  
PAYE Ref No: 002/Q1  
ECON No: E3567891A  
Small Employer

If the **Demonstration Company** is hidden, log into admin (default username: system; default password: admin) from the log in prompt.

Select the **Bureau** menu and click **Display Demo Company**.

With **Display Demo Company** ticked, click **File** and **Use IRIS Bureau Payroll**.



Enter your log in details for IRIS Bureau Payroll then select the **Demonstration Company** from the **Clients** in **Bureau Dashboard**.

# Getting Started Tutorial – Report Manager

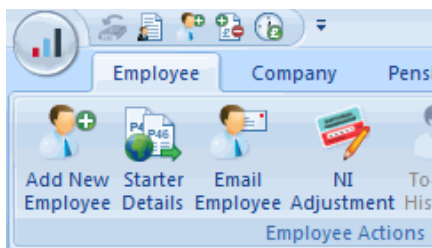
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The Getting Started Tutorials are designed to guide you through common payroll tasks using step by step instructions.

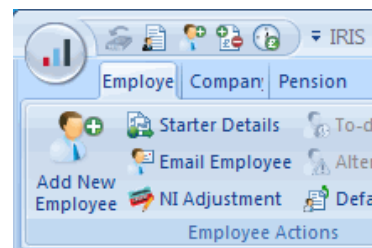
Remember there is a **Help** button on most screens, which will always give assistance specific to that task.

In these tutorials we assume that the **Ribbon** is fully expanded, (i.e. taking up the whole of your screen) so you should be able to see the buttons and groups in full.

**Maximised screen**



**Minimised screen**



## Use the Demonstration Company

You will be using the **Demonstration Company** for this tutorial.

## Reporting

The payroll provides all the statutory reports you need, as well as many reports you might need internally.

A walkthrough of how to print your **Payroll Summary**, **Payslips** and **BACS** can be found in the **'Payroll Cycle'** tutorial on the **Getting Started** tab.

Other reports we consider to be the most important are already installed for you to print; you can see these by clicking on the **'Reports'** tab, then on each individual **Reports** category button.

**Please note:** If there is only one report of that type selected, the print process will begin as soon as you click the button; if there is more than one report available for a category, you will see a drop down list of reports to select from.

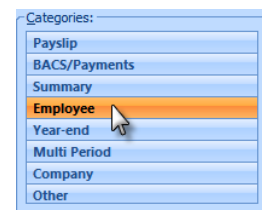
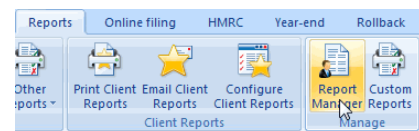
## Report Manager

The **Report Manager** is there to provide you with additional reports you feel you may need. If you select a report via the **Report Manager**, it will be available to print via the **Reports** tab.

This tutorial will walk you through selecting the **Employee Holiday Report** from the **Report Manager**, then printing it.

You first need to select the **Employee Holiday Report**. You will only need to do this once for a report:

- Click on the **'Reports'** tab, and select **'Reports Manager'**
- From the list of **Categories** on the top left, select **'Employee'**
- A list of available Employee reports will appear underneath the **Categories**. Click the **'Employee Holiday Report'** on the left and drag it across to the **Selected Reports** section on the right of the screen. (Alternatively, click on the report name to highlight it, and click the right-pointing arrow on the **Selected Reports** section.)
- Click **'Save'** then **'Close'**



### To print the selected report:

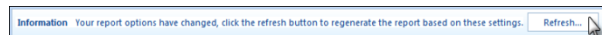
- Click the '**Reports**' tab, then the '**Employee Reports**' button. The list of selected reports will drop down. Select '**Employee Holiday Report**' and a preview of the report is sent to the screen.

The **Ribbon** is now opened on a new **Report Options** tab, which only appears when printing reports.

**Please note:** The options that appear differ according to the type of report you are printing. The online **Manual** on the **Help** tab will detail all of these options for you but the main features to notice are:

- The option to print the report for selected employees only
- The ability to select a different period (and print a historical report) in the **Select Period** group (this group only appears when you are printing a summary type report or a payslip)
- The option to choose a different **Detail Level**, to show Company, Department or Employee totals on the report

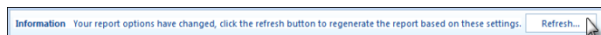
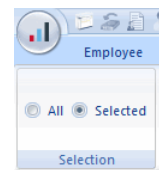
Any time you change one of these options, the following message appears under the **Ribbon**:



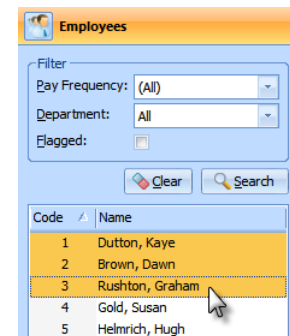
You need to click '**Refresh...**' before you can print the report again.

As an example of how to use **Report Options**, we will reprint the **Employee Holiday Report** for three selected employees:

- Click '**Selected**' in the **Selection** group
- Hold down the CTRL key on your keyboard and left click on employees 1, 2 and 3 in the **Selection Side Bar**
- Click the '**Refresh**' button below the **Report Options** tab



- The print preview now shows the report for the three selected employees only
- Click '**Print**' in the bottom right, if you want a hard copy, or click '**Close**'



## Further Information

**Reports** and the **Report Manager** are comprehensively covered in the online **Manual**, as well as in the **How to Guides**. You can find these on the **Help** tab. You can also find information in the **Manual** with regards to other reporting sections designed to assist you in your payroll reporting such as **Optional Reports; Print Client Reports; Email Client Reports** and **Custom Reports**.

A walkthrough of how to print your **Payroll Summary, Payslips** and **BACS** can be found in the '**Payroll Cycle**' tutorial on the **Getting Started** tab.

Alternatively, if you need some help with a particular screen click the '**Help**' button which you can find on most screens, or press the '**F1**' key on your keyboard, to open the **Manual** directly on the correct topic.

More **Getting Started Tutorials** can be found on the **Help** tab. If you encounter any difficulties, please visit [www.iris.co.uk/contactsupport](http://www.iris.co.uk/contactsupport)

## 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 5661 (option 5)

Fax: 0844 815 5665

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