Getting Started Tutorial – Report Manager

IRIS Payroll

April 2016
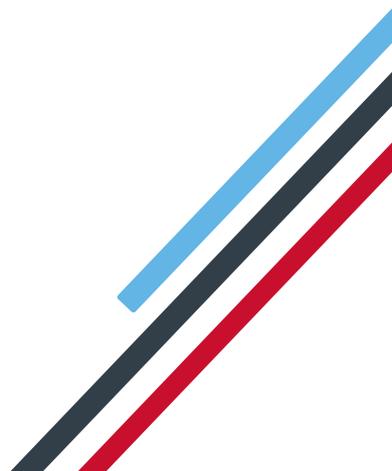
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The Getting Started Tutorials are designed to guide you through common payroll tasks using step by step instructions.
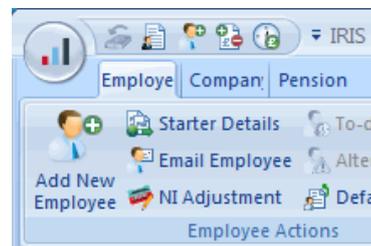
Remember there is a **Help** button on most screens, which will always give assistance specific to that task.

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.
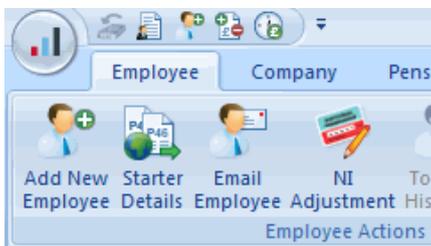
Maximised screen	**Minimised screen**

Use the Demonstration Company

You will be using the **Demonstration Company** for this tutorial. For details on how to access the Demonstration Company, click **here**.

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 **Help** tab |**Getting Started** section.

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:

1. Click on the **Reports** tab, and select **Report Manager**

2. From the list of **Categories** on the top left, select **Employee**

3. 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)

4. Click **Save** then **Close**

To print the selected report

1. 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:

1. Click **Selected** in the **Selection** group

2. Hold down the CTRL key on your keyboard and click on employees 1, 2 and 3 in the **Selection Side Bar**

3. Click the **Refresh** button below the **Report Options** tab

4. The print preview now shows the report for the three selected employees only

5. Click **Print** in the bottom right, if you want a hard copy, or click **Close**
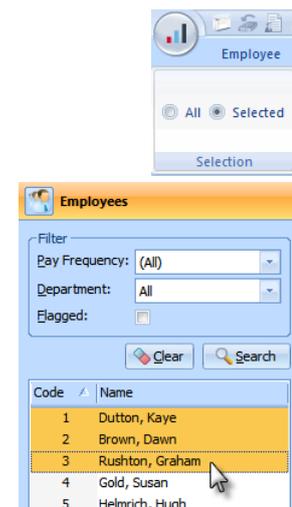
Further Information

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.

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

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.

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	support@gppayroll.co.uk
IRIS GP Accounts	0844 815 5681	gpaccsupport@iris.co.uk
Earnie or Earnie IQ	0844 815 5671	support@earnie.co.uk

Call: 0844 815 5700 for IRIS or 0844 815 5677 for Earnie
Visit: iris.co.uk