



IRIS Bureau Payroll

Getting Started Guide

Configuring Holidays

Getting Started Tutorial – Configuring Holidays

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

Before using any of these tutorials we strongly recommend that you view the tutorial '**Getting to know your IRIS Bureau Payroll**', which shows you how to use any of the features that you may not be familiar with, such as the **Ribbon** and the **Selection Side Bar**.

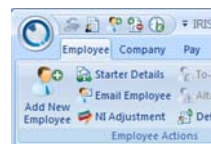
Remember there is a **Help** button on most screens, which will always give you assistance specific to that task.

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

IRIS Bureau Payroll maximised



Smaller IRIS Bureau Payroll screen



Use 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**'.

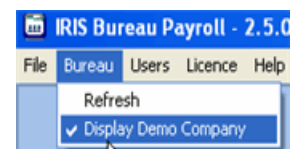
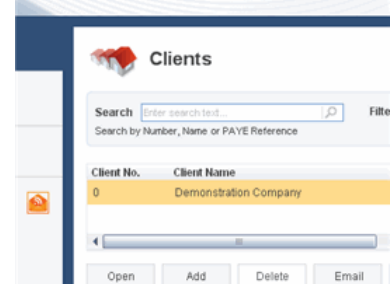
If the **Demonstration Company** is not displayed, log into admin (default username: system; default password: admin) from the log in prompt.

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** section in the Bureau Dashboard.

IRIS Bureau Dashboard



Configuring Holidays

This tutorial describes how to set up a default holiday allowance for your Client and how to allocate that allowance to employees.

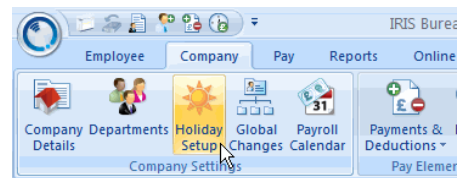
First you are going to set up a default holiday allowance of 25 days a year per employee, with a carry over entitlement of 5 days.

Next, you will change an individual employee's holiday allowance.

NOTE: Carry Over Entitlement is the maximum amount of holiday employees are allowed to carry over into the new holiday year.

To set up a default holiday allowance for your client:

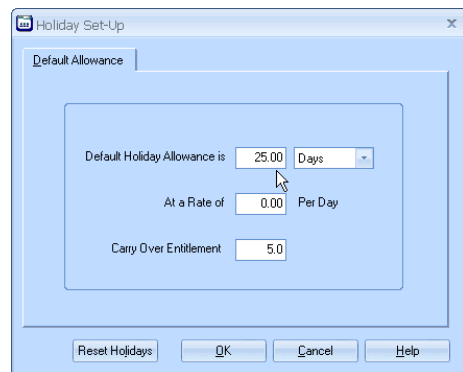
Click the **'Company'** tab then **'Holiday Setup'**



In the **Default Holiday Allowance** field and change the number of days to 25

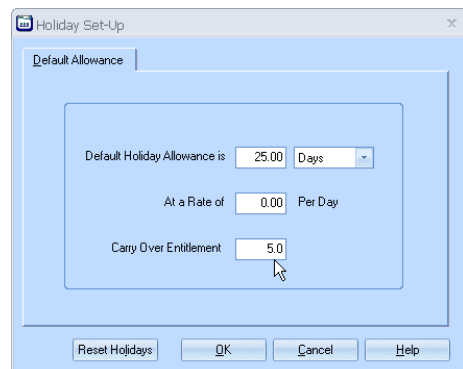
The holiday type is already set to **Days** so you don't need to change it (other options are Hours, Weeks and Months)

NOTE: If you were setting up a standard pay rate for holidays you would enter it here.



In the **Carry Over Entitlement** field and change the value to 5

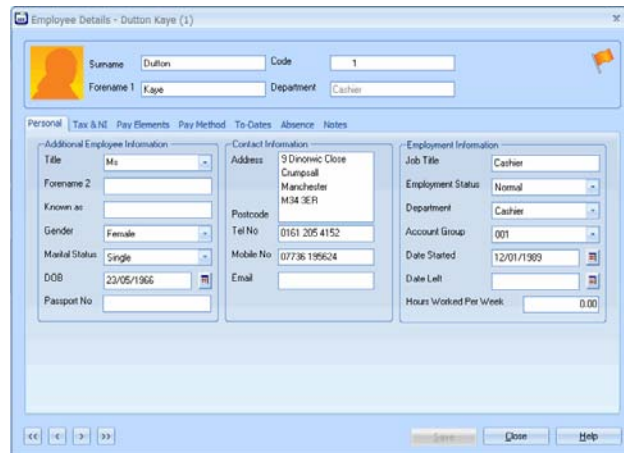
Click **'OK'**



NOTE: Holiday information entered here will be added to each new employee you create. It will not apply to any existing employees – you need to update those individually.

To change an existing employee's holiday entitlement:

Double-click the name 'Dutton, Kaye' on the Selection Side Bar



Employee Details - Dutton Kaye (1)

Surname: Dutton Code: 1
Forename 1: Kaye Department: Cashier

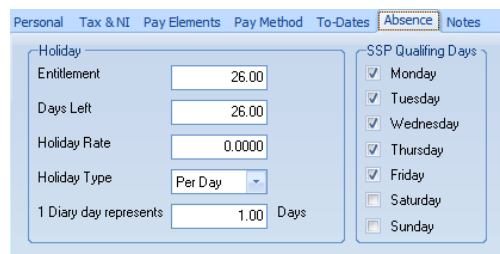
Personal | Tax & NI | Pay Elements | Pay Method | To-Dates | Absence | Notes

Additional Employee Information: Title: Ms, Forename 2, Known as, Gender: Female, Marital Status: Single, DOB: 22/05/1966, Passport No.

Contact Information: Address: 9 Dronomic Close, Cransall, Mansfield, M34 3ER, Postcode, Tel No: 0161 205 4152, Mobile No: 07736 199624, Email.

Employment Information: Job Title: Cashier, Employment Status: Normal, Department: Cashier, Account Group: 001, Date Started: 12/01/1999, Date Left, Hours Worked Per Week: 0.00

Click on the 'Absence' tab



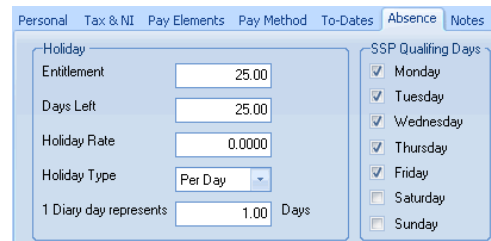
Personal | Tax & NI | Pay Elements | Pay Method | To-Dates | Absence | Notes

Holiday Entitlement: 26.00
Days Left: 26.00
Holiday Rate: 0.0000
Holiday Type: Per Day
1 Diary day represents: 1.00 Days

SSP Qualifying Days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

In the **Entitlement** field and change the value to 25

Click 'Save' then 'Close'



Personal | Tax & NI | Pay Elements | Pay Method | To-Dates | Absence | Notes

Holiday Entitlement: 25.00
Days Left: 25.00
Holiday Rate: 0.0000
Holiday Type: Per Day
1 Diary day represents: 1.00 Days

SSP Qualifying Days: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Further Information

NOTE: When employees use some of their holiday entitlement, you can record the days/hours etc. taken in the **Diary**. The amount of holiday taken will be deducted from the employee's entitlement when the payroll is calculated for that pay period.

For more information about **Holidays**, including **Setup, Diary Entry** and paying holiday pay, see the IRIS Bureau Payroll Manual; click on the 'Help' tab and then 'Manual'.

More Getting Started Tutorials can be found on the Getting Started side tab within IRIS Bureau Payroll.

If you encounter any difficulties, please visit www.iris.co.uk/contactsupport.

Software & services available from IRIS



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 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 Accounts Office

Smarter accounting for growing businesses



IRIS Backup

The easiest, most secure way to back up and restore your business files

Stationery order line

 **0844 815 5700**

HMRC online service helpdesk

 **0845 605 5999**

 **0845 366 7828**

 **helpdesk@ir-e-file.gov.uk**

HMRC employer helpline

 **0845 7143 143**

HMRC new employer helpline (for new business)

 **0845 607 0143**

Support

 **0844 815 5661**

 **0844 815 5665**

 **support@iris.co.uk**

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