

Earnie

(incl. Payroll Basics)

Data Export Guide - 2025

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Introduction

This guide explains how to transfer your data from IRIS Earnie to a CSV or .txt file. To ensure you get the maximum benefit from the export feature, we strongly recommend that you read this guide to familiarise you with the steps to follow.

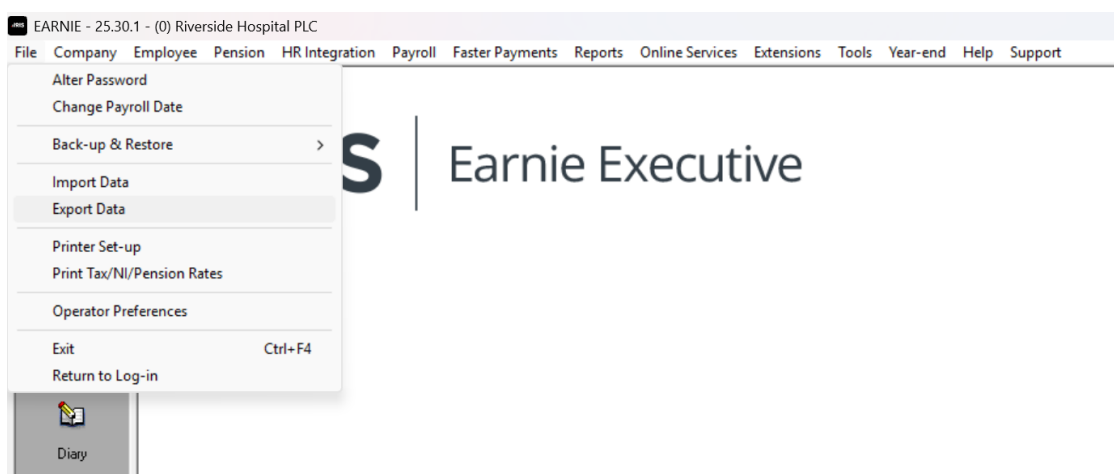
Before proceeding, please be aware, this process is designed for exporting **static data** from payroll, for example exporting employee details. This method is not suitable for exporting pay period variations as all data fields are exported as standard values rather than temporary ones.

Creating Export Files in Earnie

This guide focuses on the process of exporting data. Importing data works in exactly the same way except it is accessed via the 'Import Data' option. Whenever you save an export structure the corresponding import structure is automatically created and vice versa.

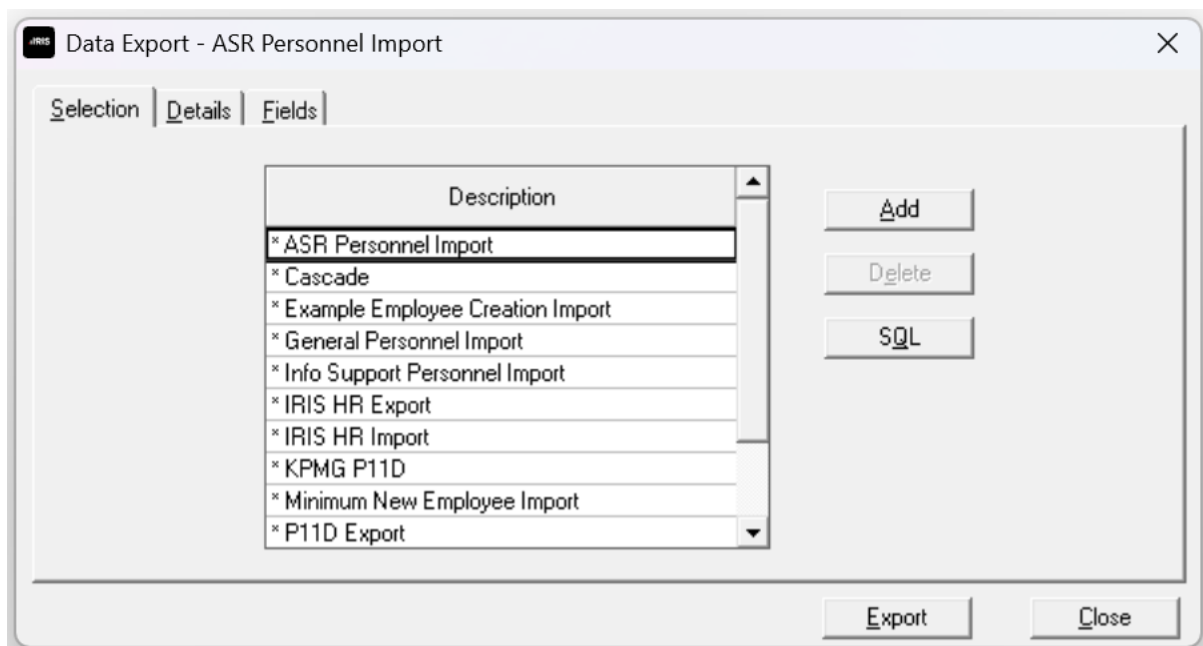
There are some standard export structures already created, although you may need to create your own export structure, which allows you to select exactly which fields you want to include in the file.

To create your own export file navigate to 'File' on the top menu and Select 'Export Data'.



The next screen to appear will display a list of all existing Export files – these can be standard structures that have been created for specific export purposes, plus any export structures that you may have already created yourself.

Selection/Add Export File

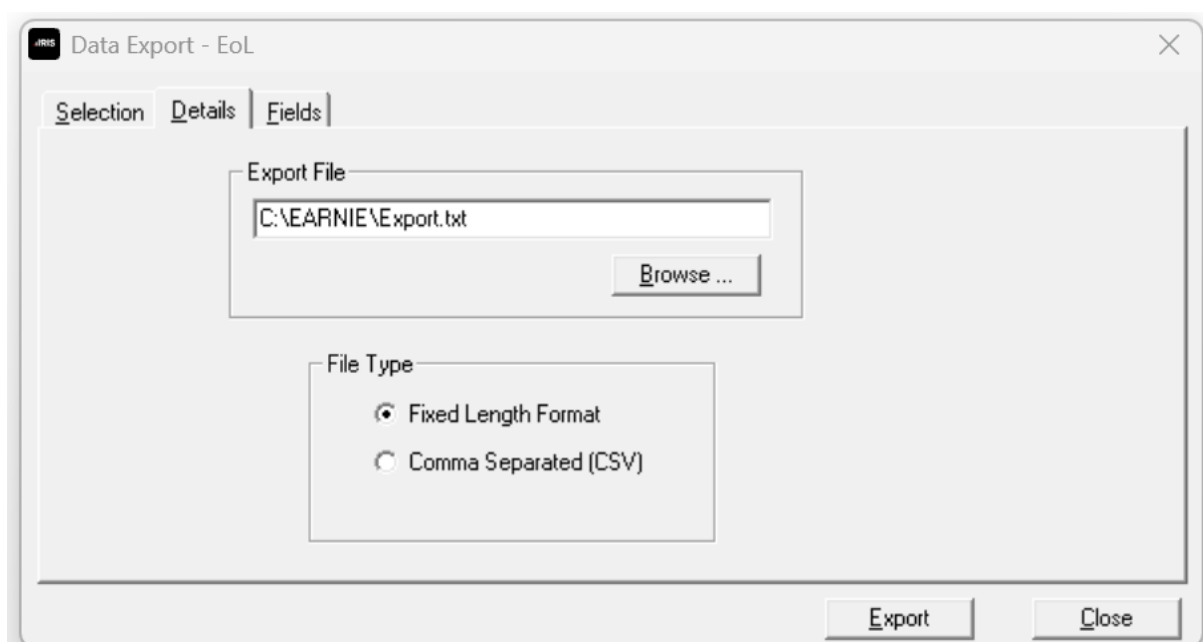


To create a new export file, click the **Add** button. Once selected the system will ask if you want to copy an existing structure. Click **Yes** to create an export structure with the fields in other tabs set as per the export structure being copied. Select **No** to create a new export structure. The fields/options in the other tabs will be blank, or as per the default for that field/options.

From this screen you can also **Delete** an existing export file. Any files with * at the beginning are standard files and cannot be deleted.

Once you have clicked **Add** to create a new export file, click onto the **Details** tab.

Export File Details



You can browse to a file that you have already created to export data to, or you can enter a name for the export file in the **Export File** field.

Click the **Fields** tab to specify exactly what information will be in the exported data file, and in what order.

Data Export Fields

Field	ID	Line	Start Position	Length	Default Value
CODE					
Access Level					
Account Group					
Active Status					
Actual Pay Current Month					
Actual Pay This Period					
Actual Pay To-date					

From this tab you can specify the fields that you want to include in the export file, in the order you need them to appear. Use the grid to specify the data that will be contained in the exported file. The first Field is always Code – you cannot amend this

- **Field Name:** This is a drop-down menu, listing all the fields available for export from IRIS Payroll in alphabetical order. Selecting a field from the drop-down adds it to the export structure
- **ID:** This is used for fields that can be exported more than once, for example NI values where an employee has changed NI letter during the year, or if an employee has multiple hourly rates
- **Example:** imagine you have 2 hourly rates configured – Basic (ID = 1) and Weekend (ID = 2). You want to export data which contains your employees' **Basic** rates of pay. You must select **Hourly Rate of Pay** in the field column, then enter 1 in the **ID** column
- **Line, Start Position and Length:** These columns are only used if the **File Type** on the Details tab is set to **Fixed Length Format**. The **Line** number is required because you may want one employee's data to be spread over several lines. The **Start Position** specifies the location within the **Line** where the data begins, and **Length** specifies the number of characters the data occupies
- **Example:** the following data shows a **Fixed Length** data file with the employee code, surname and first name in line 1 and the NI number and tax code in line 2.

123Smith	John
NM12345678B647L	

The **Data Export Structure** required to export this data would look like:

Field	ID	Line	Start Position	Length
CODE		1	1	3
Surname		1	4	10
Forename1		1	14	10
NI Number		2	1	11
Tax Code		2	12	6

- **Default Value:** When a default value is entered, it will populate the default into the export file for the selected field during the export process, ignoring what may be entered into the equivalent field for the employee in the software

The screen also contains the following buttons:

- **Check:** Click this button to validate the entries in the Fields grid
- **Save:** Click this button to validate and Save the changes you made to the Export File
- **Insert:** This will insert a blank row above the row highlighted
- **Delete:** This will delete the highlighted row
- **Format:** When clicked, will display the Data Export- Define Field Format screen

Data Export – Define Field Format

This screen allows you to enter values used in the export file for the specified field.

- **Field Name:** Use the drop-down list to select the field you want to specify the format for
- **Description** and **Earnie Format:** You cannot amend these columns. **The Earnie Format** is the internal value held by the software
- **Export File Format:** Enter the value required in the export file for the field. This allows the value being exported to be read and translated into the format required for export.

Export Data

Clicking **Export** begins the export process. Click **Yes** to the message to confirm you want to export. Checks will take place to ensure the export file name and location exist, the export file name is in the correct format, and the number of fields in the export file matches the number of fields in the selected export file structure.

On completion, a message will appear advising that the export file has successfully been created.

-End-