

IRIS Payroll Business

(incl. IRIS Bureau Payroll (IBP), and IRIS Payroll for Accountants)

Data Export Guide - 2025

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IRIS Payroll – Export Data

Introduction

This guide explains how to transfer your data from IRIS Payroll 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.

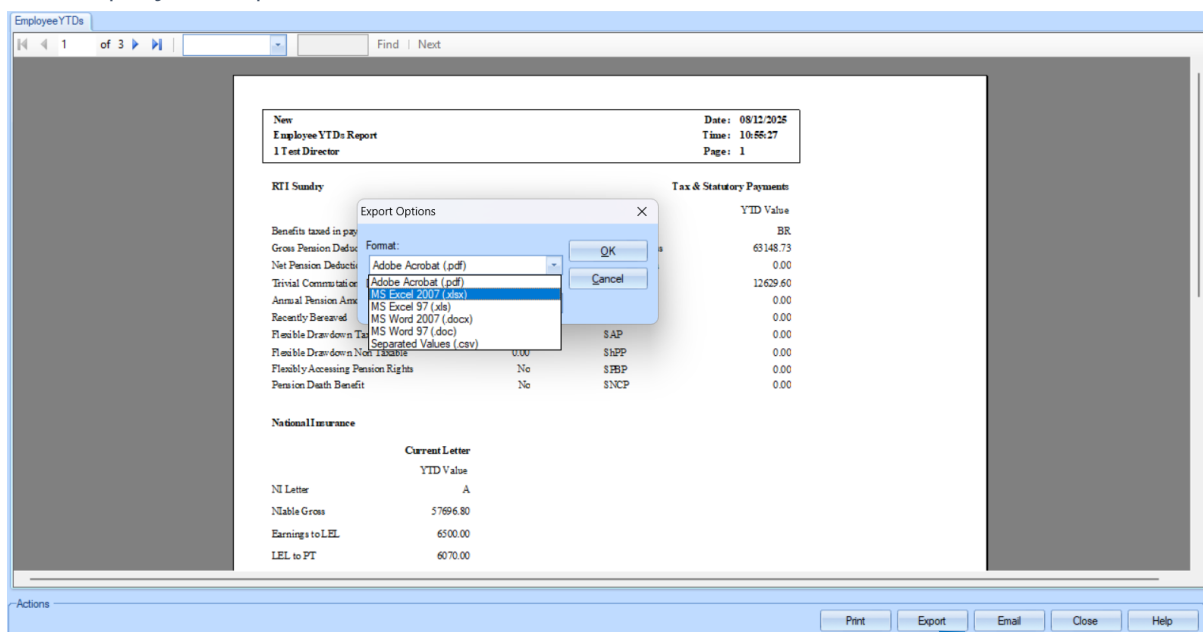
Before proceeding, please be aware, this process is designed for exporting **static data** from payroll, for example exporting employee details. This method is not suitable for exporting pay period variations as all data fields are exported as standard values rather than temporary ones.

Finalise Pay in IRIS Payroll

Before beginning the export file process, you need to firstly ensure that your current pay period in IRIS Payroll is complete and finalised. Make sure you have made any necessary amendments to employees, processed leavers, calculated payroll and created required reports, pension output files and BACS output files. Making a backup of data at this point is also recommended.

Recommended reports

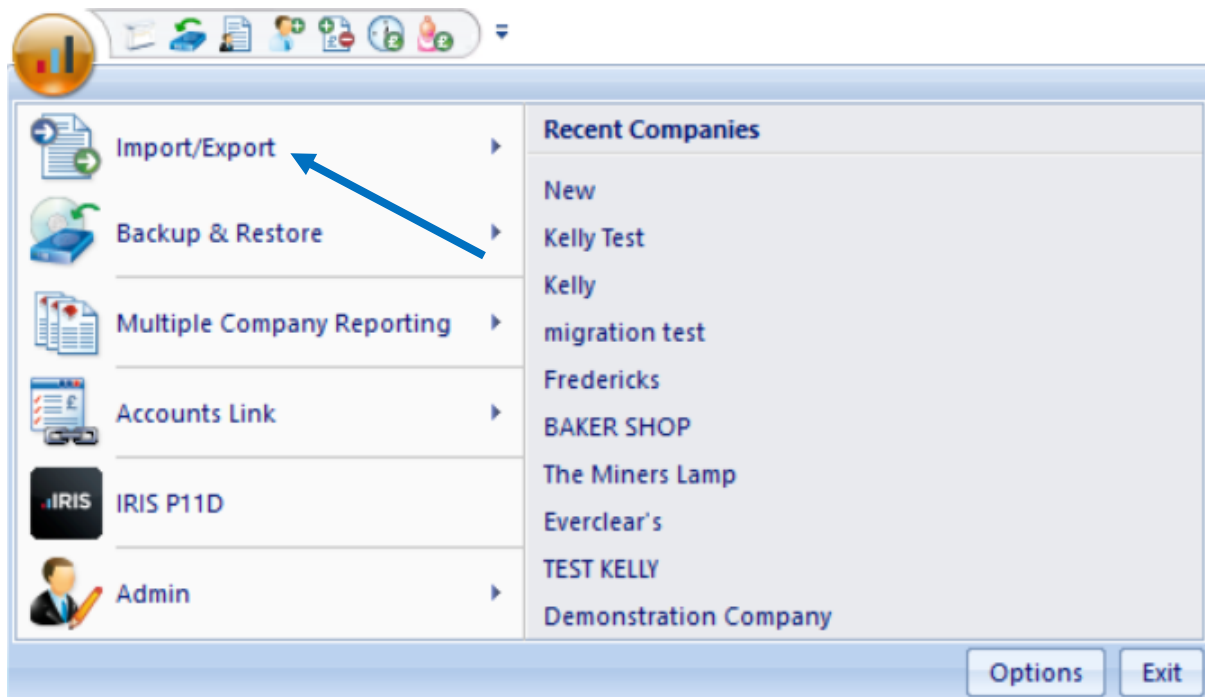
Once payroll is processed, print your reports as usual. In addition to your normal reports, there are some reports that we recommend you produce for your records. All reports in IRIS Payroll can be exported and saved in multiple formats, so you can create any that you may find useful for your records. As a starting point, we'd suggest creating exports of Employee YTDs, P11s and the company P30 report.



Create export files

IRIS Payroll has a function that allows you to import data into the software and create files for export out of the software. 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.

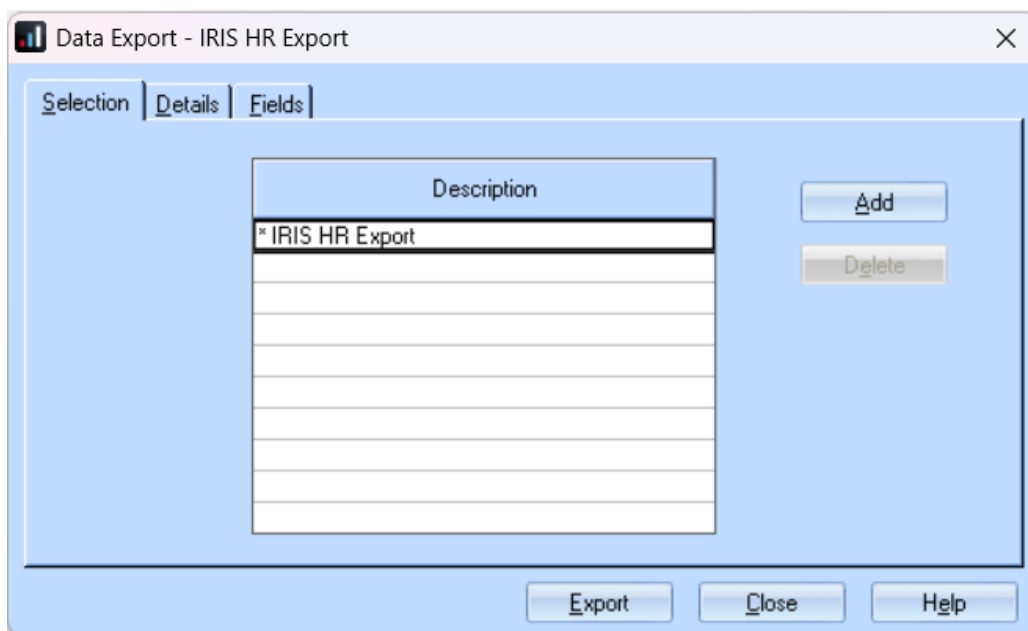
To create your export file, go to the Import/Export menu item, which is accessed from the main Application menu in IRIS Payroll:



Once selected, you will be given the option to **Import Data** or **Export Data**; 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

The screenshot shows a dialog box titled "Data Export - test" with a close button (X) in the top right corner. It has three tabs: "Selection", "Details" (which is active), and "Fields". The "Details" tab contains the following elements:

- Export File:** A text input field containing "IRIS HR Employee.csv" and a "Browse ..." button to its right.
- File Type:** Two radio button options: "Fixed Length Format" and "Comma Separated (CSV)". The "Comma Separated (CSV)" option is selected.
- Employee Selection:** Two radio button options: "All" and "Selected". The "All" option is selected.

At the bottom of the dialog box are three buttons: "Export", "Close", and "Help".

From this tab you can enter or browse to the location you want the export file to be saved to. The data can be exported in either of 2 formats: **Fixed Length** or **CSV**. If you use the fixed length format you must specify the start position and length of each field in the Fields tab.

As default, the file is exported as a Comma Separated (CSV) file. 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.

From the **Employee Selection** section, you can choose if you want to export details for **All** employees or a **Selected** employee – in which case on the employees highlighted in the Selection side bar are included.

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					
Account Group					
Active Status					
Actual Pay Current Month					
Actual Pay This Period					
Actual Pay To-date					
Address Line 1					

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 **Payroll Format:** You cannot amend these columns. **The Payroll 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 -