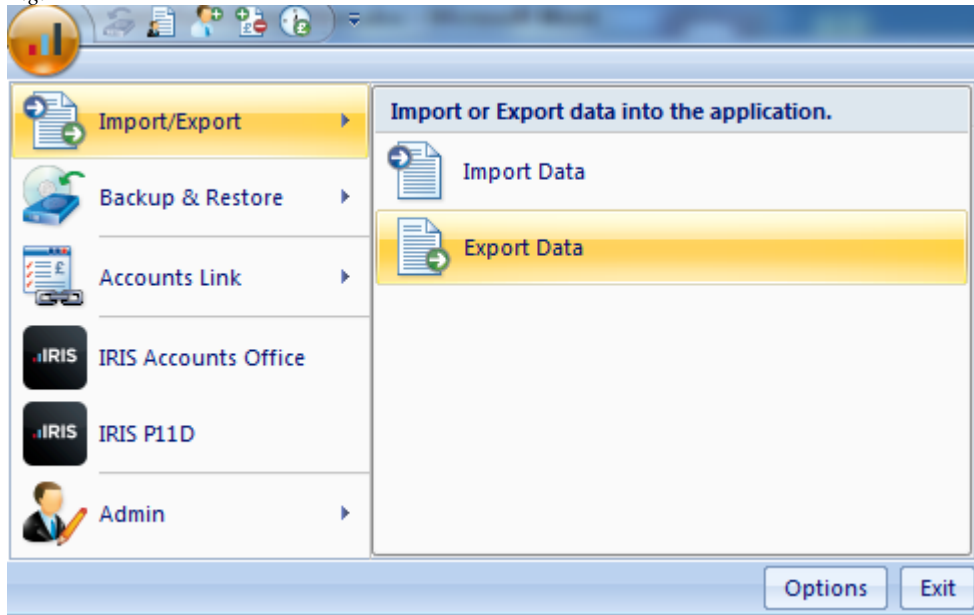


IRIS – Import from CSV into BrightPay

Export facility not available in the basics version.

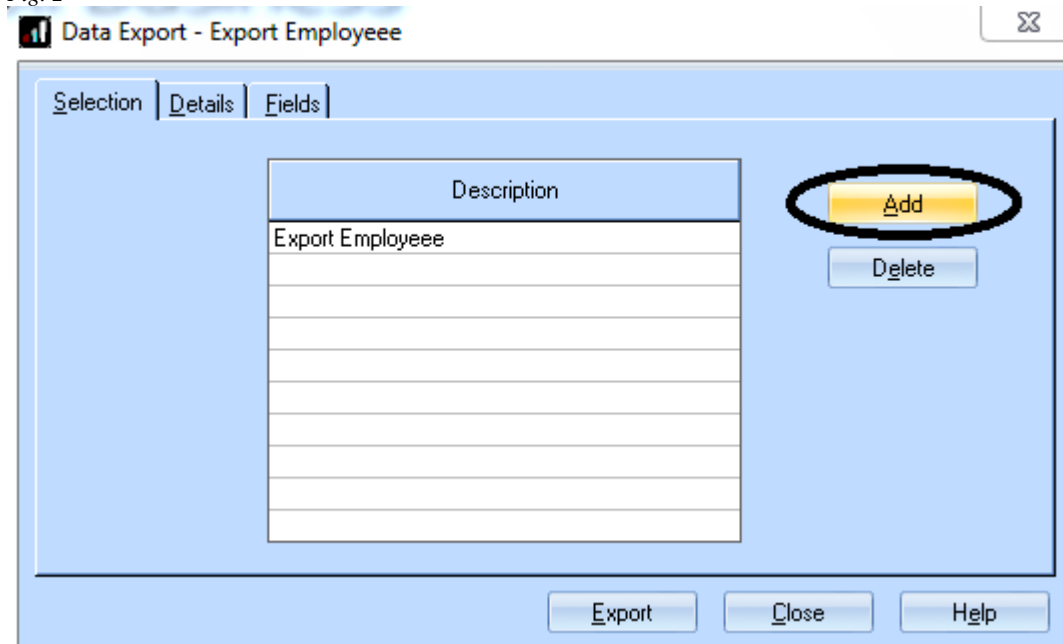
1. To export employee information to a **CSV** go to **file > Import/ Export > Export**

Fig.1



2. A new data structure needs to be added and named. Click **Add**, and then type the name of the data structure. Eg. Export Employee

Fig. 2



3. Next click the **Details** Tab and select the location for your file (by pressing the Browse button) and select the file type as CSV. In the employee section click for “All” employees

Fig.3

The screenshot shows the 'Data Export - Export Employee' dialog box with the 'Details' tab selected. The 'Export File' field contains the path 'C:\Users\Desktop\Export file.csv' and a 'Browse...' button. The 'File Type' section has two radio buttons: 'Fixed Length Format' and 'Comma Separated (CSV)', with the latter being selected. The 'Employee Selection' section has two radio buttons: 'All' and 'Selected', with 'All' being selected. At the bottom are 'Export', 'Close', and 'Help' buttons.

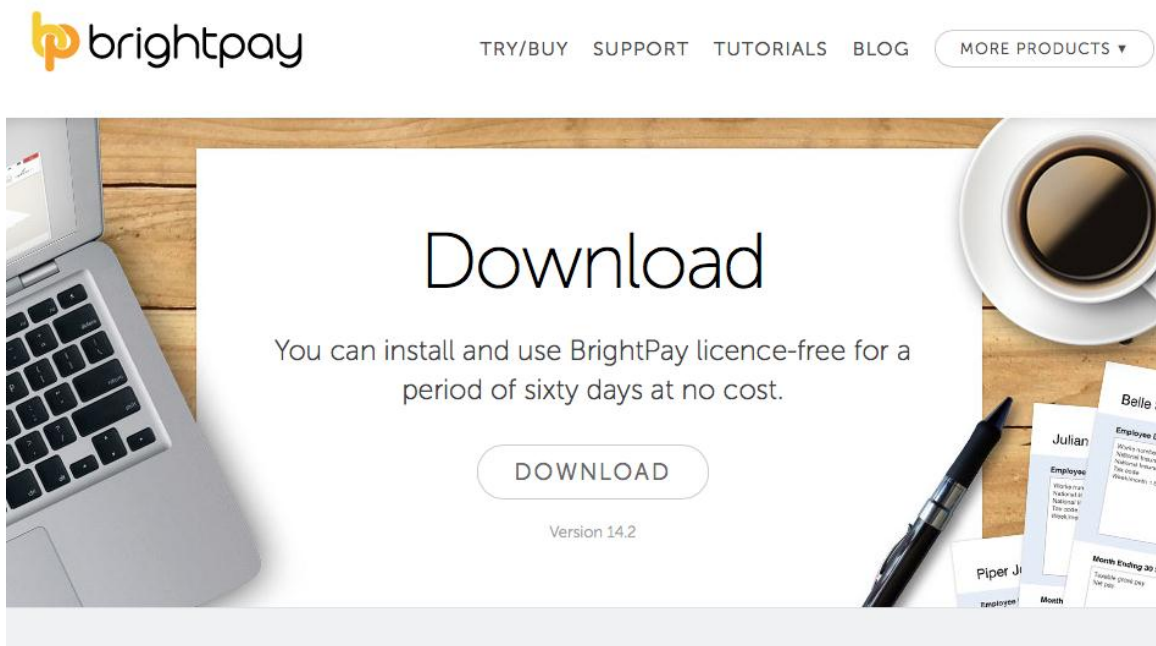
4. Next in the “**fields**” tab Select the fields you wish to export to your CSV file, the employee personal information and cumulative information needs to be exported finally click **export**. Your CSV file is now ready to be imported in to BrightPay.

Fig .4

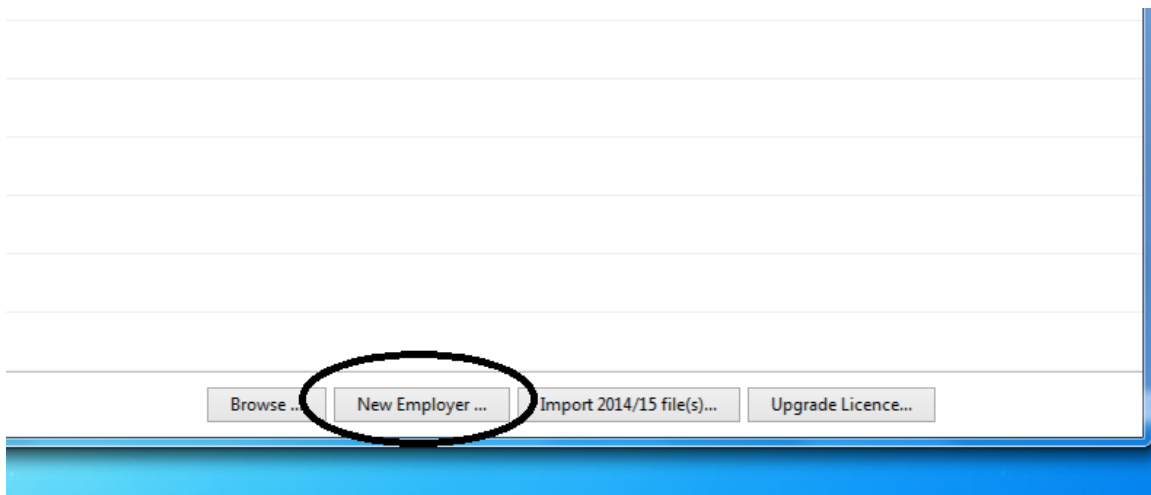
The screenshot shows the 'Data Export - Export Employee' dialog box with the 'Fields' tab selected. It displays a table with columns: Field, ID, Line, Start Position, Length, and Default Value. The table lists various fields including CODE, Forename 1, Surname, Address Line 1, Address Line 2, Address Line 3, Date of Birth, Tax Basis, NI Number, and NI Rate. The 'NI Rate' row is highlighted. To the right of the table are buttons for 'Check', 'Save', 'Insert', 'Delete', and 'Format'. At the bottom, the 'Export' button is circled in black, along with 'Close' and 'Help' buttons.

Field	ID	Line	Start Position	Length	Default Value
CODE					
Forename 1					
Surname					
Address Line 1					
Address Line 2					
Address Line 3					
Date of Birth					
Tax Basis					
NI Number					
NI Rate	1				

5. Next you will need to Download and Install **BrightPay** from our website
www.brightpay.co.uk




6. Once downloaded **BrightPay** will open, select **New Employer** to create your company.



7. Select **Continue Part Way** in the 15/16 tax year


Set Up New Employer

How would you like to use BrightPay?




Start at Beginning of the 2015/16 Tax Year

Select this option if you are starting payroll at the beginning of the 2015/16 tax year.



Start Partway in the 2015/16 Tax Year

Select this option if you are starting payroll partway in the 2015/16 tax year, with no previous payroll records in the 2015/16 tax year.



Continue Partway in the 2015/16 Tax Year

Select this option if you already have payroll records for the 2015/16 tax year up to this point, and wish to continue where you have left off. Selecting this option will allow you to enter the 2015/16 year to date figures for each employee.

Progress indicator: 1 of 5 steps selected

< Previous Next >

8. Add in your Company information, such as **Name** and **address** and click **Next**

Set Up New Employer

Employer Name

Name

Address

Address

Country

Progress indicator: 2 of 5 steps selected

< Previous Next >

9. Enter your **PAYE** number and **Accounts Office Reference** click **Next** when ready.

The screenshot shows a window titled "Set Up New Employer" with a sub-header "Employer Registration". It contains three input fields: "HMRC office name" (empty), "Employer PAYE Reference" (containing "864" and "3GNU2J0302" separated by a slash), and "Accounts Office Reference" (with a placeholder text: "Optional for set up. Will be required when sending RTI submissions."). Below these is an "Additional" section with a checked checkbox for "Small Employers' Relief" (text: "Employer qualifies for Small Employers' Relief") and an "Employer Contracting-Out Number (ECON)" field (with placeholder text: "If applicable"). At the bottom are "< Previous" and "Next >" buttons, with a progress indicator showing the current step is selected.

10. Enter your **Typical Employee Setting**, such as pay frequency, working days etc. Click **Next** when ready.

The screenshot shows a window titled "Set Up New Employer" with a sub-header "Your Typical Employee". It includes a note: "These settings will be used as the default when adding a new employee. They can of course be changed on an individual basis if required." The form contains several settings: "Typical pay frequency" (Monthly), "Typical pay basis" (Based on a Monthly Rate / Annual Salary), "Typical pay method" (Credit Transfer), "Typical annual leave year starts" (6 April), "Typical annual leave entitlement method" (Set number of holiday days), "Typical annual leave days in year" (28.0), and "Typical annual leave carry-over" (checked, text: "Carry over annual leave days/hours from previous year"). Under "Typical working days", there are checkboxes for Mondays, Tuesdays, Wednesdays, Thursdays, Fridays (all checked), and Saturdays, Sundays (unchecked). At the bottom are "< Previous" and "Next >" buttons, with a progress indicator showing the current step is selected.

11. If Applicable enter your **Staging Date**, (*This would be sent to you by the pension regulator.*)

Automatic Enrolment Staging Date

UK employers must automatically enrol their staff into a workplace pension if they meet certain criteria.

Your staging date is when your automatic enrolment duties first come into force. If you don't know your staging date, consult the [What is my staging date?](#) article on The Pensions Regulator website.

Staging date

(You can skip this step and enter your staging date later if required.)

Progress indicator: 8 dots, 7th dot highlighted.

< Previous Next >

12. If required enter a **password** and when ready click **Save and Finish**. Your company will now be added to the program.

Create Your BrightPay Employer Data File

To protect the information in your employer data file you may optionally set a password, which will be required to open the data file in future.

Use a password ☐ Protect your employer data file with a password

Enter password

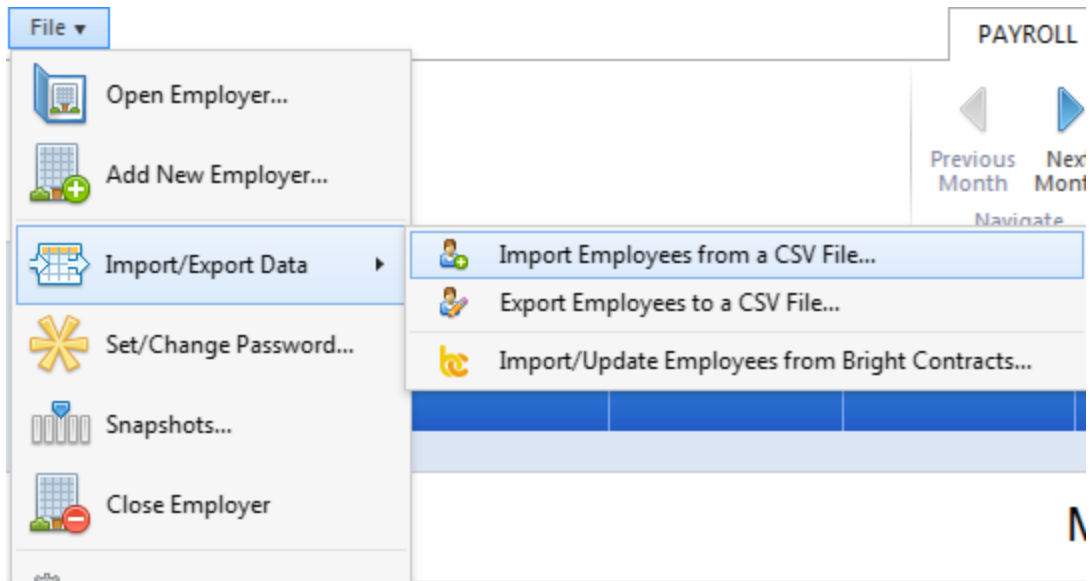
Confirm password

When you're ready, click *Save and Finish*.

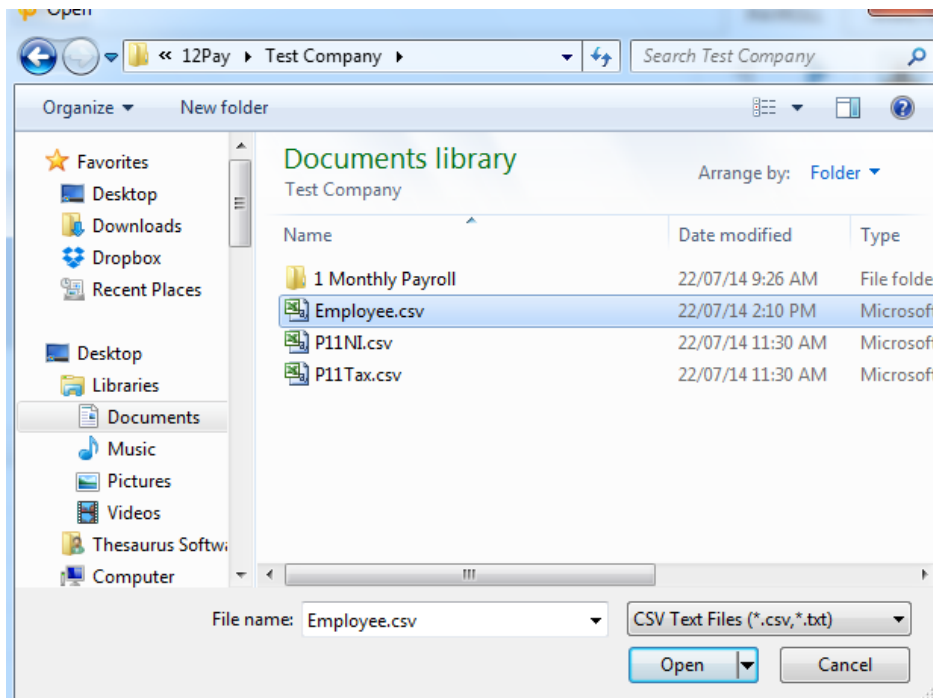
Progress indicator: 8 dots, 8th dot highlighted.

< Previous **Save and Finish ...**

13. Open your company, to import your Employees go to **File > Import/ Export Data > Import from a CSV file**



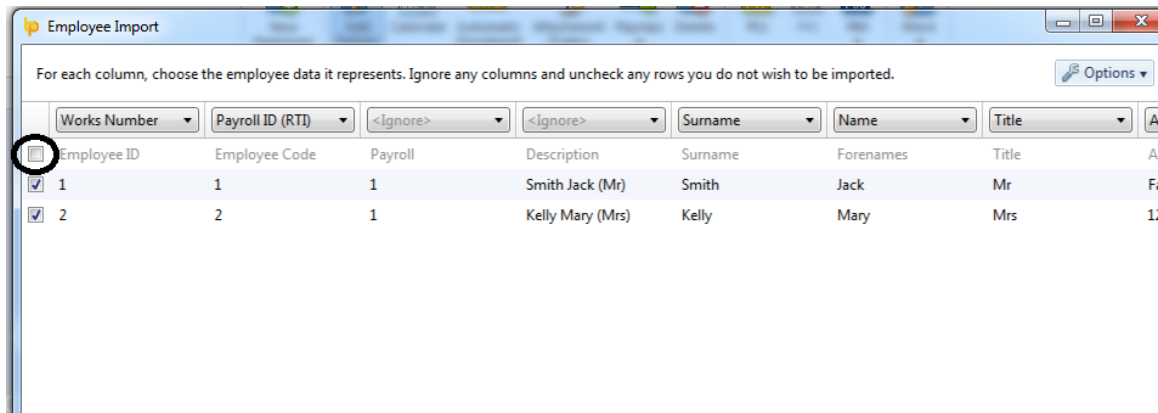
14 Browse to the location of your Employee CSV file. Once selected press **Open**



15. Select from the dropdown select what information is in each column, move the scroll bar to the right to select address, date of birth, gender.gross to date etc.

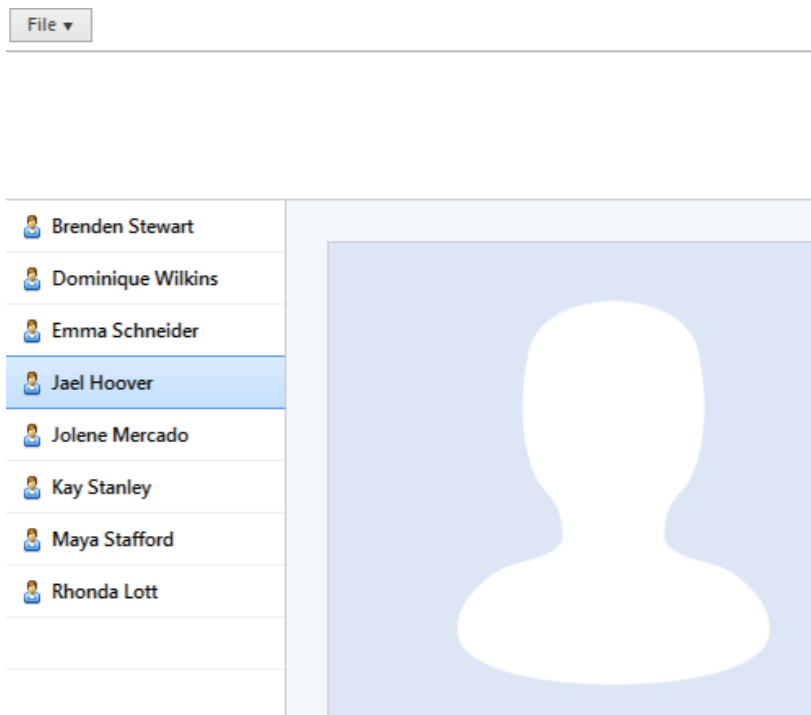
n.b Don't forget to untick the first line of the import as these are headers which you should not import

Once all the necessary information has been select click **Import**



The 'Employee Import' dialog box is shown. It has a title bar with a yellow icon and the text 'Employee Import'. Below the title bar is a instruction: 'For each column, choose the employee data it represents. Ignore any columns and uncheck any rows you do not wish to be imported.' There is an 'Options' button with a key icon. Below this is a table with columns: Works Number, Payroll ID (RTI), <Ignore>, <Ignore>, Surname, Name, Title, and A. The first row is a header row with checkboxes in the first two columns. The second row is a data row with checkboxes in the first two columns. The third row is a data row with checkboxes in the first two columns. The fourth row is a data row with checkboxes in the first two columns. The fifth row is a data row with checkboxes in the first two columns. The sixth row is a data row with checkboxes in the first two columns. The seventh row is a data row with checkboxes in the first two columns. 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The ninety-sixth row is a data row with checkboxes in the first two columns. The ninety-seventh row is a data row with checkboxes in the first two columns. The ninety-eighth row is a data row with checkboxes in the first two columns. The ninety-ninth row is a data row with checkboxes in the first two columns. The hundredth row is a data row with checkboxes in the first two columns.

16. You will now see all your employee personal information. To view go in to the **Employee** Tab. Your employees will be listed on the left hand side.



The 'Employee' tab is shown. It has a 'File' button. Below the button is a list of employees. The list is as follows:

Employee Name
Brenden Stewart
Dominique Wilkins
Emma Schneider
Jael Hoover
Jolene Mercado
Kay Stanley
Maya Stafford
Rhonda Lott

To the right of the list is a large blue square with a white silhouette of a person's head and shoulders, indicating a profile picture.

17. You can now start to run your payroll. To set up your payroll schedule go to **Payroll** and select your first pay date and week/ month ending date.

Set Up Monthly Schedule

My first monthly pay date will be ▼

for the month ending on the ▼ *of* ▼