Migrate Keytime data to IRIS Elements

Welcome to IRIS Elements

We are now inviting Keytime customers to upgrade to IRIS Elements. This upgrade will give you access to our online accountancy platform along with all the products and features you are subscribed to.

Upgrading to IRIS Elements involves migrating, or moving, your data from your Keytime product to our platform so that all your client information, tax data, accounts data and VAT data will be stored in your new Elements account.

We are here to help you

- This guide contains lots of information on what migrating your data means, how to do it and how we can help you. We recommend reading through these pages first to give you an idea of what to expect. Once you are set up, there is also a lot of information on how to use IRIS Elements available on our online Help Centre (https://help-iris.co.uk/elements/home.htm).
- We have dedicated teams available to support you in this move. Depending on what package you have with us, you can do this migration yourself or ask us to get you started. If you haven't spoken to us already, you will discuss your support package during your call with our Customer Migrations team.

  What help is available?

  If you would like us to help you with this migration, the Platinum flexiserve package includes time with a member of our team who will get you set up and migrate the first 10 clients with you.

  If you feel comfortable migrating this data yourself, this help centre will be your main source for information.

Learn about the IRIS Elements platform

Why are we upgrading you?

We know that not everyone will welcome this move but it is essential to make sure your data is secure. Older products like Keytime unfortunately cannot always keep up with changes in technology and compliance. Using IRIS Elements means that you are always using the latest HMRC compliant software and you will be ready for the changes that are coming with the Making Tax Digital (MTD) initiative. Using a cloud product also means you don't have to worry about upgrading to new versions anymore, we do all of that for you behind the scenes.

Find out more about IRIS Elements and Making Tax Digital (MTD) on our website.

A timeline of the upgrade and migration process

Your invite to upgrade depends on a number of factors, including which Keytime products you subscribe to.

If you haven't been invited yet but would like to upgrade to Elements, you can register your interest and a member of the team will get back to you. Use the eligibility bot on our website to check if you are able to migrate.

Once you have been invited to migrate, what happens next?

1. We will call you to discuss your new IRIS Elements account. We will assess your current setup and advise on anything you need to do or plan for before you begin. We will also discuss your options with the level of support you need during the upgrade.
2. On a date that works for you, our team will create your new IRIS Elements account. You will receive an email with instructions on how to log in.
   You will also receive an email inviting you to the IRIS Service Community - this is our online support portal. Please follow the instructions in the email to make sure you can contact support if needed. You can find out more about the IRIS Service Community on this page - Get help and support.
3. At this point, you can start to learn about using IRIS Elements.

Migrating your data to IRIS Elements

Once you are set up with your new IRIS Elements account, you can start to migrate your data from Keytime. Below is a brief overview of this process, there is more detailed information on following pages in this help centre.

1. You'll need to do some data preparation before you start migrating your clients. This will involve making your existing client records as complete as possible.
2. We'll provide you with a piece of software to download onto your computer. This software creates a connection between your Keytime software and IRIS Elements.
3. Once the connection is established, you can migrate client records and relationships, tax and/or accounts data, and VAT obligations into IRIS Elements. You can migrate all your records at once, or you can migrate them one at a time or in batches - whatever works for you.
4. Once all your data is migrated, you are ready to start using IRIS Elements fully!

Planning your migration

Before you begin to migrate any data, it is important to have a plan for how you will approach this process.

How to plan your migration

It is important to know:

1. "What data do you want to move to IRIS Elements?" 3
2. "When is the best time to make the move?" 4

What data do you want to move to IRIS Elements?

During the migration process, we will guide you through moving your data. The steps will be slightly different depending on what data you are moving. You can move:

- Tax
- Accounts
- VAT
- Trial Balances (from Keytime Compac only)

If you are moving all or a combination of the above, we advise to start with your Tax data and then move on to Accounts, VAT and Trial Balances.

Are you migrating Confidential Clients?

When migrating clients from Keytime to IRIS Elements, the confidential status of the client record is maintained. Any confidential clients are migrated into IRIS Elements in the same way as any other client record, but they are only visible to users with administrator permissions. This ensures that all client confidentiality is maintained.

When is the best time to make the move?

The following steps will help you choose a good time to move your data:

1. Identify clients that have filing deadlines coming up soon. If you are also migrating VAT data, identify which clients have VAT returns due in the next month.
2. Decide which clients you will complete in Keytime, and which will be completed in Elements. We suggest clients with short deadlines are completed in Keytime to allow for familiarisation of Elements without the pressure of an imminent filing deadline
3. As far as possible, complete and file any tax returns, VAT returns and statutory accounts that have a filing deadline that is coming up soon.

   Note the migration of Accounts Production data does not include all notes and accounting policies, therefore, if you have started to produce accounts in Keytime it is better to finish and file them there to avoid loss of data on migration

Find your HMRC and Companies house credentials

Your credentials for HMRC and Companies House are **not** migrated with your data, so make sure you have these noted somewhere before you start migrating.

Preparing to migrate

Before migrating your data to IRIS Elements, you need to ensure that it is in good condition to be moved. This page will outline how to ensure your data is in a state that Elements can read and accept.

How to prepare your Keyime data for migration

Why do I need to do this?

Elements manages clients a bit differently from Keytime.
In Keytime, for each customer, you need a client record to exist in every Keytime product you are using.

For example, you have a client called Business Industries Ltd. You do corporation tax returns and accounts for them in Keytime. This means you'll have a record for Business Industries Ltd in **Keytime Corporation Tax**, and a record for Business Industries Ltd in **Keytime Accounts Production**. These records only sync up if they are linked via **Practice Manager**, otherwise you would need to update them separately when making changes to client information.

In IRIS Elements, there is a single client record per entity - no matter how many products you subscribe to.

In our example situation, you will now only need one client record for Business Industries Ltd. You'll be subscribed to **Elements Tax Professional** and **Accounts Production Professional**, but work from the same single client record for this client. If you later decide to subscribe to **Elements AML**, you will also do your AML work from this single client record. This is part of what makes Elements special.

Your data is moved from Keytime to IRIS Elements using a tool called the **Data Migration Agent (DMA)**. The DMA will take these previously separated client records and combine them into one, so IRIS Elements can understand it. In order for the DMA to do this, we need to make sure your data contains certain data points. The data points used to match records will depend on what type of client they are, e.g. a sole trade will have different matching criteria than a trust.

What do I need to do?

The most important thing is you'll need to make sure that client records are consistent. They also need to contain specific data points to be migrated, as listed below.

These data points **must be** consistent in all areas. Deduplication does not employ non-approximate matching ('fuzzy matching'), meaning that a name or first line of the address, for example, must match exactly in order to resolve the duplicate.

It is strongly advised that before data is migrated, you set time aside to review client records and ensure that data contained in the fields noted below is consistent between all client records. Mismatches will result in a duplicate client record being created in Elements.

Prepare your data

Before you migrate your data, go through your client records in each of your Keytime products and make sure each client type contains the following information:

Client reference or code

If you use client references or codes, please ensure that these are unique for each client. If you do not use them, or only use them for some clients, you do not need to add them before migrating as Elements will give each client a unique identifier during migration.

Unique Taxpayer Reference (UTR)

This is sometimes also known as 'tax reference'. It may seem strange, but if possible it is essential that you add the UTR number to your client accounts for both Tax and Accounts (if you are migrating both). This helps the DMA and Elements to find all data related to the same client and combine it properly.

Incorporated entities (limited companies, LLPs, incorporated charities)

- Company registration number

Unincorporated charities

- Charity registration number

Sole trades and partnerships

- Business name
- VAT number
- First line of address
- Postcode

Individuals

- National Insurance Number
- First name
- Last name
- First line of address
- Postcode

Trusts

- Trust name
- VAT number
- First line of address
- Postcode

Once you are confident that your data is in the right state, the next step is to use the Data Migration Agent to start moving your data into IRIS Elements.

The Data Migration Agent (DMA)

The Data Migration Agent (DMA) is a small application that allows you to move your client data from your original IRIS product to your new IRIS Elements account.

The DMA must be downloaded, installed, and configured before you can migrate data.

Before installing:

You must have Windows Admin credentials to manage this on your own PC or laptop. If you don't have the right permissions, consult with your IT supplier.

Important: Before attempting to install and configure the DMA, please note the following:

- You must have an active IRIS Elements account to connect to. Check your emails for an activation link if you haven't set up your IRIS Elements account yet.
- The DMA must be installed on a PC or laptop that has your Keytime product installed.
- The latest version of .NETDesktop Runtime is required. Go to https://dotnet.microsoft.com/en-us/download to download the latest version.

- The latest version of Keytime Accountants Suite is required. Go to https://www.iris.co.uk/support/iris-keytime-suite-support/iris-keytime-downloads/ to download the latest version.

1. Find your data

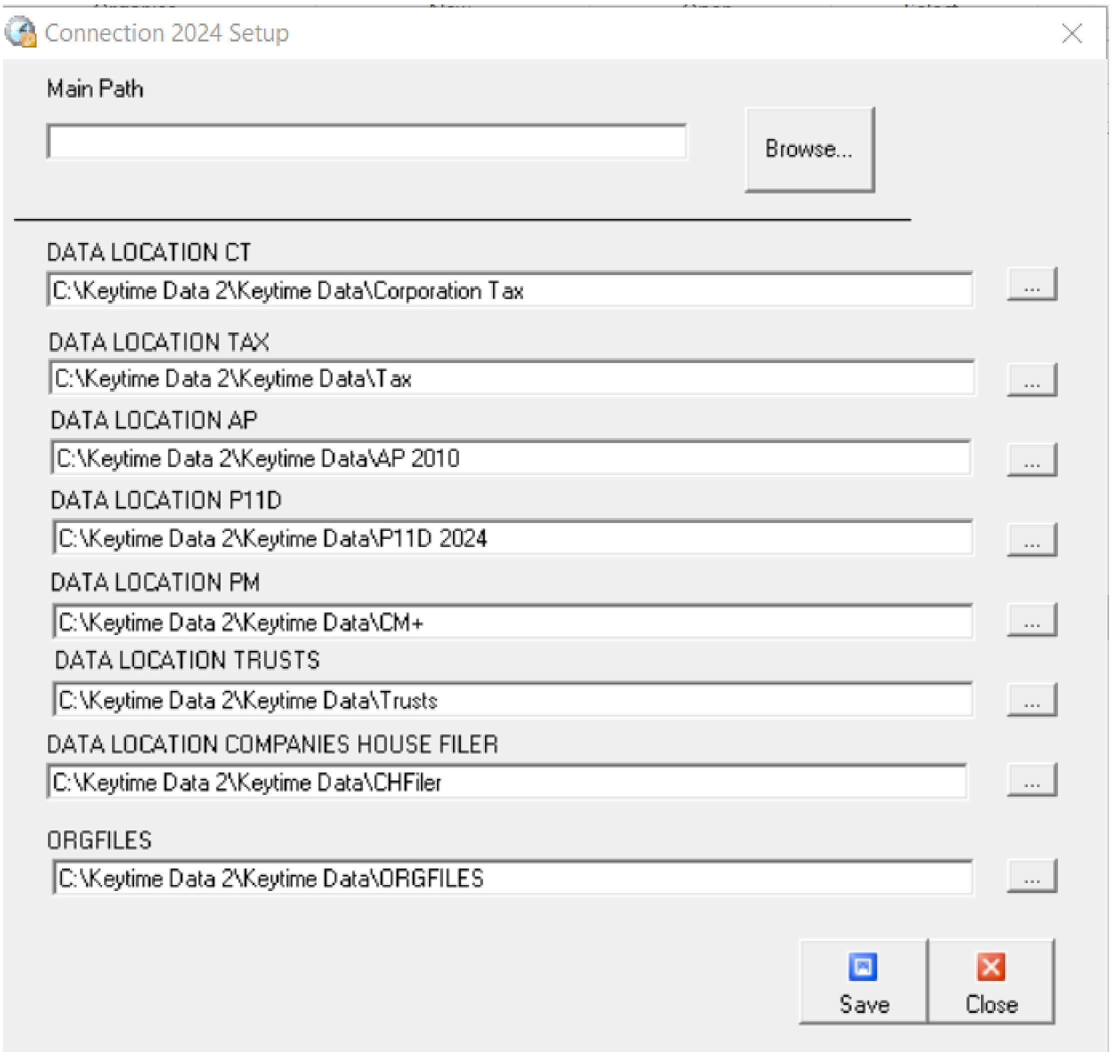
To successfully connect your data to the DMA, you must know where your data is stored.

- If your data is stored on your computer or laptop, the DMA will connect to the database and move the data.
- If your data is stored on a server, you will need to give the DMA permission to access the server before it can connect to your data to move it.

Follow the steps below to find where your data is in Keytime, and then how to give the DMA permission to access the data if needed.

How do I check where my data is?

1. Go to the location of your Keytime install (this will usually be on your C: drive).
2. Open the **Keytime** folder and then the **CM+** folder.
3. Double-click the **DataManager.exe** file. Your data paths are displayed in the pop-up.



If the data location starts with something like `C:\`, this means it is stored locally. You don't need to do anything else, go to Step "2. Downloading and installing the DMA" 10

If the location looks something like `\\company\keytime\platform\example.db`, this means it is stored on a server and you may need to give the server permission to share this data with the DMA.

1. Go to the server where your Keytime data is stored, right click on the Keytime folder and select **Properties**.
2. Go to the **Sharing** tab and select **Advanced Sharing**.
3. Make sure **Share this folder** is selected, then select **Permissions**.
4. Select **Add**.
5. Enter a group name, such as Everyone and select **Check Names**. Select **OK**.
6. Select the checkbox to allow **Full Control**. Select **OK**.

7. Make sure to select **Apply** to save your changes. Select **OK** to close the window.

2. Downloading and installing the DMA

1. Download the latest version of the DMA from the download page (https://www.iris.co.uk/support/ptp-software-support/dma-downloads/) and make a note of where it downloaded to.
2. On your PC or laptop, find the download file and double-click to run.
3. Follow the instructions on screen to install the DMA. A shortcut to the DMA Configuration Tool is placed onto the PC or laptop Windows Desktop.
4. Right-click the DMA Configuration Tool shortcut and select **Run as Administrator** to launch.

3. Data Migration Agent (DMA) Configuration Tool

Launching the DMA Config Tool takes you to a **Product Selection Setup** page where you have the option to configure the DMA to allow your chosen IRIS product's data to be migrated IRIS Elements.

The DMA supports multiple IRIS products, so you must make sure you select the correct product before proceeding.

Select **Keytime Accounts Production including Keytime Tax** and then **Next** to proceed.

4. Using the DMA

Once you have selected to migrate **Keytime Accounts Production including Keytime Tax**, please check you have completed the required prerequisites before you start migrating your data.

These Prerequisites cover **all** the IRIS Product offerings available for migration; not just for the product currently selected.

1. Select the checkbox to confirm you have completed the prerequisites, and select **Next** to continue.
2. Enter the email address of your **IRIS Elements user** and select **Next**. Then enter your **Password** and select **Verify**.
3. Once you're signed in, select **Next** to continue.
4. Your Keytime installation should be auto-detected. If it is not, use the **Browse** option to find it.
   Select **Test Connections** to validate the path is correct.

- If successful, the data path turns green.
- If the path is red, the DMA did not detect your client data in the location specified. Select **Browse** and navigate to the correct data location.
- If the path is amber: the DMA detected your client data in the location specified, however, the DMA does not have permission to access the data. Make sure you have followed the steps above in "The Data Migration Agent (DMA)" to grant permission.

5. Select **Save** and then **Next**.
6. Select **Start DMA Service** to start the DMA.
7. Select the link to go to **IRIS Elements** and log into the platform, if you haven't already.

The DMA is now forming a connection between your Keytime client data and IRIS Elements. The next step is to start moving your data along that connection.

Migrate your Keytime data

This section contains the following information on migrating the different types of data from Keytime.

Depending on what data you are planning to move, we recommend migrating your **tax data first**, followed by **accounts** data and then **VAT** data.

- How to migrate tax data from Keytime to IRIS Elements
- How to migrate accounts data from Keytime to IRIS Elements
- How to migrate VAT data from Keytime to IRIS Elements
- "How to migrate Trial Balances from Keytime Compac" 16

Once you have finished migrating all your data, the next step is "View and check your data after migration" 18.

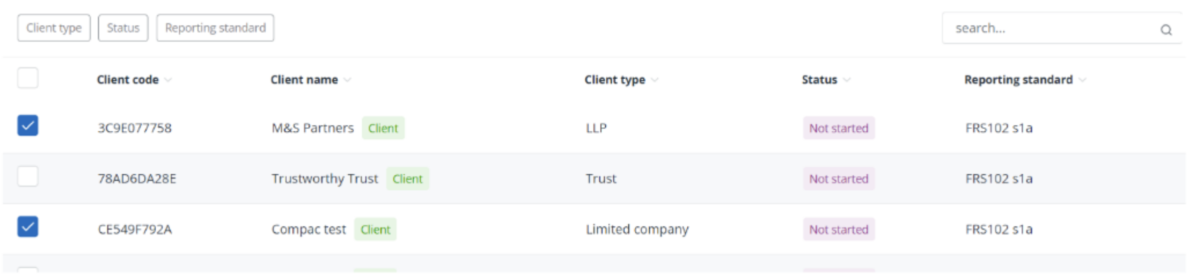
Migrate your tax data into IRIS Elements

When you have prepared your data and downloaded and configured the Data Migration Agent (DMA) you are ready to migrate data.

You must ensure all users are logged out of Keytime prior to commencing data migration.

1. Go to IRIS Elements (https://iriselements.io/) and log in with your credentials, if you haven't already.

2. Open the Settings menu and select **Data Migration Service**.
3. Select **Migrate your Keytime or PTP Tax data**.
4. Select **Get Client List**. Your client data will be retrieved from Keytime and displayed in a list.
   You can filter and sort the list if needed. You can also search for a client using the **Search** option.
5. Select client records to migrate by using the checkbox on the record row. You can migrate as much data as you want to - a single client record, a batch of clients or all clients at once. Migrate all clients by selecting the checkbox in the header row of the list.



6. Select **Migrate** to begin the migration of data. A pop up message wil display to ask you to check you are ready. If you are, select **Start Migration**
   While the migration is running, don't close the IRIS Elements platform or the DMA. You can navigate away from the page if you want to, the migration will run in the background.
   The status of selected records will change to **In Progress** once the migration begins. When the migration is complete a **Success** message will be displayed on screen and the status of the client records selected will change to **Migrated**.

You can migrate client records in batches and over a period of time if you wish. Each time you return to the Elements data migration service we advise that you click **Refresh Client List**; this ensures you always have the latest client list available to work with, and new clients added to Keytime since the last batch of clients was migrated will be included.

If you experience any problems while migrating, check our "Troubleshooting" 19 page.

If you are continuing to migrate data, the next step is to Migrate your accounts data.

If you are finished migrating, the next step is to View and check your data after migration.

Migrate your accounts data into IRIS Elements

When you have prepared your data and downloaded and configured the [Data Migration Agent (DMA)] you are ready to migrate data.

You must ensure all users are logged out of Keytime prior to commencing data migration.

1. Go to IRIS Elements (https://iriselements.io/) and log in with your credentials, if you haven't already.
2. Open the Settings menu and select **Data Migration Service**.
3. Select **Migrate your Keytime or PTP Accounts data**.
4. Select **Get Client List**. Your client data will be retrieved from Keytime and displayed in a list.
   You can filter and sort the list if needed. You can also search for a client using the **Search** option.
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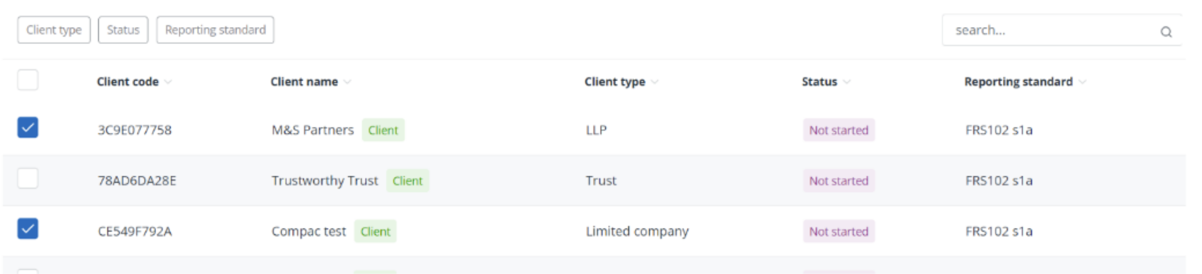

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If you experience any problems while migrating, check our "Troubleshooting" 19 page.

If you are continuing to migrate data, the next step is to "Migrate your VAT data into IRIS Elements" 14.

If you are finished migrating, the next step is to "View and check your data after migration" 18.

Migrate your VAT data into IRIS Elements

Once you have migrated your Tax and/or Accounts data, it is time to bring your VAT data into IRIS Elements.

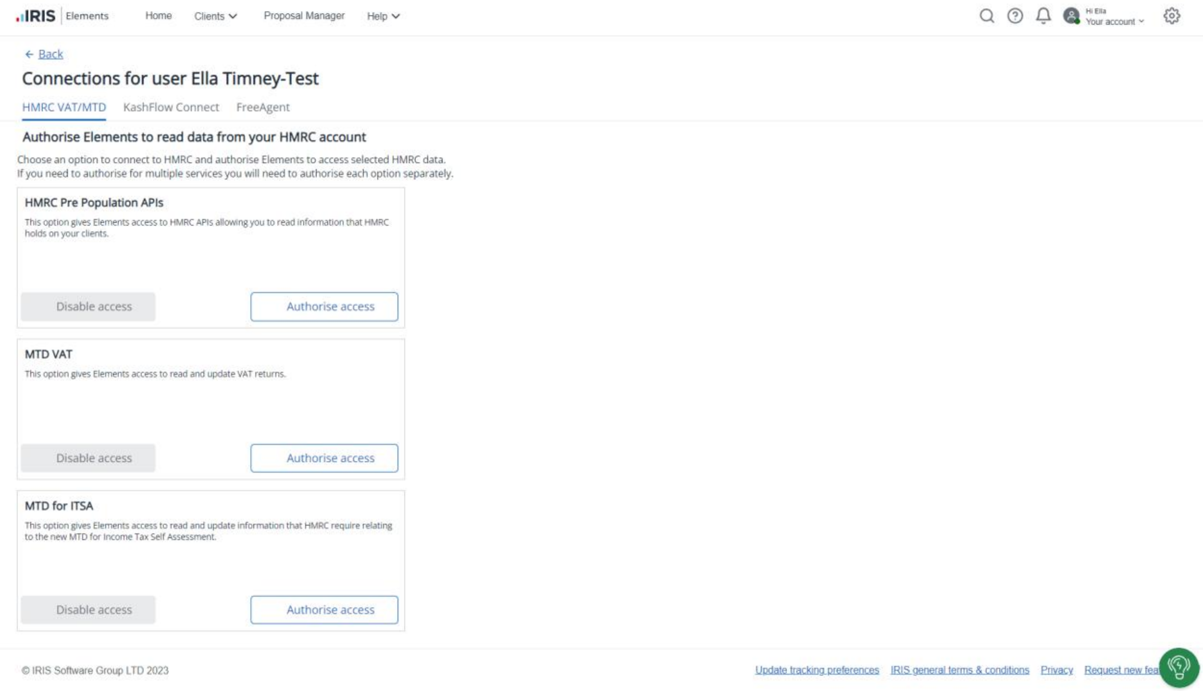
There are two steps to this:

- "Set up VAT" 14
- "View and Download VAT obligations" 15

Set up VAT

You must connect IRIS Elements to HMRC to allow data to be passed between Elements and HMRC. This only needs to be done once.

1. Select the **Admin settings** cog icon.
2. Select **Settings**, then select **Connections**.
3. On the **HMRC VAT/MTD** tab, for each option select **Authorise Access**.



HMRC Pre populations APIs – retrieves self-assessment information that HMRC holds on your clients, such as employment income and National Insurance.
MTD VAT – connects to HMRC APIs so you can complete and submit VAT returns.
MTD ITSA – retrieves information and submits to HMRC under the new Making Tax Digital for Income Tax Self-Assessment (MTD ITSA). This option is only available for those currently within the HMRC pilot.

3. On the HMRC website, select **Continue**, then **Sign in to Government Gateway** and enter your Government Gateway credentials.

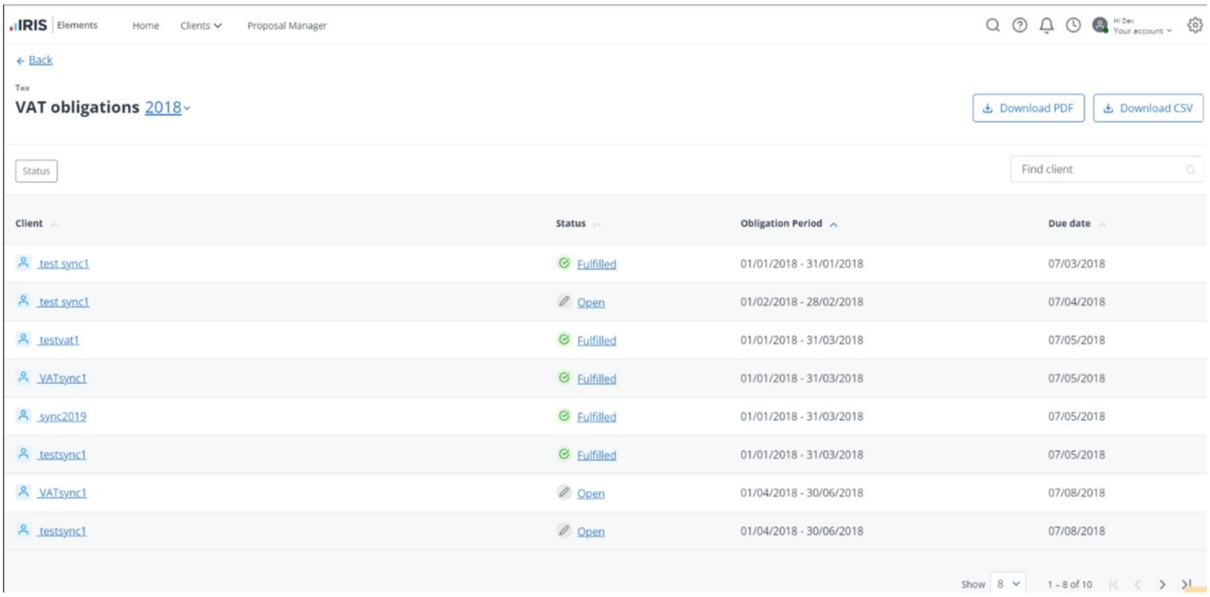
   Make sure you enter your Agent Services ID and not your Government Gateway ID. You may be asked to go through additional questions to confirm your identity - don't worry, this is standard procedure.
4. Select **Give permission**.

   Permission is granted for 18 months, so this process will need to be repeated at the end of the period. Select **Disable access to HMRC data** to disable access.
5. The connection is made and you'll return to the **Connections for user page**.

View and Download VAT obligations

You can view and download a summary of forthcoming VAT obligations for all your clients from the VAT obligations widget on the home page.

On the **VAT obligation** widget on the home page, select **View all**.



- Choose the tax return year from the **Corporate tax returns** list at the top of the widget.
- Filter the list using the **Status** filter.
- Use **Find client** to search for a specific client return. The list will reduce based on what you type.
- Sort the columns by selecting the down arrow next to the column heading.
- Select any **Status** to open the **VAT** tab for that client.
- Select the client name to open the client dashboard for the selected client.

Once you've defined the required list, you can then download the list as a CSV or PDF file by selecting the applicable icon.

If you use Keytime Compac, the next step is "How to migrate Trial Balances from Keytime Compac" 16.

If you have finished migrating, the next step is to "View and check your data after migration" 18.

How to migrate Trial Balances from Keytime Compac

The migration of Trial Balance data from Keytime Compac to IRIS Elements consists of three steps:

- "Download your client Trial Balances from Keytime Compac" 17
- "Map your data to IRIS Elements" 17
- "Create your clients and import their Trial Balance data to IRIS Elements" 17

Download your client Trial Balances from Keytime Compac

1. In **Keytime Compac**, navigate to your client accounts.
2. Go to **Trial Balance** and open the **Current TB**.
3. Select **Menu F4** and then **CSV file**. Your CSV file is now saved to the default location to your computer.
4. Repeat this for each client you want to migrate to IRIS Elements.

Map your data to IRIS Elements

1. Download this [example CSV file].

   The trial balance CSV import file must be structured as: `Account,Description,Year End dd/mm/YYYY`. For more information, go to Manually create a trial balance CSV file on our Help Centre.
2. Reorder your data so it matches the example file format. Open your saved file from the previous step and make the following changes:
   - Apply a negative value to Column F
   - Concatenate Columns E and F
   - Remove Columns C and D
3. Go to this page on our Help Centre - https://help-iris.co.uk/elements/migrations/ptp-keytime/keytime-compac.htm and download the mapping file.
4. Apply the mapping code to your data.
   For example, where the Compac Accounts chart code was **12**, in IRIS Elements it is **130**.

   If you are experienced with using Excel, you can speed up this process by temporarily adding another column to your file with the IRIS codes in it and then performing a vlookup. Remember to remove this added column once you have mapped the codes.

Create your clients and import their Trial Balance data to IRIS Elements

1. Open IRIS Elements and create your clients.
2. Import your trial balance data for each client. Go to https://help-iris.co.uk/elements/accountsprod/import-csv-data.htm on our help centre for more information on this step.

View and check your data after migration

Once you've migrated your data into the IRIS Elements, you can view it in the new platform and check everything is there.

How to view your tax data in IRIS Elements

There are two ways to view your tax data in IRIS Elements: from the main dashboard or from a client record.

To view your data from the dashboard:

1. Open IRIS Elements (https://iriselements.io)
2. The dashboard is displayed. Scroll down to the **Corporate tax returns** widget. The widget will show a summary of the status of your tax returns.
3. Select **View all**.
4. The full list of client data is displayed.

To view your data from a client record:

1. Open IRIS Elements (https://iriselements.io)
2. Select the **Clients** menu from the top bar and then select **Clients list**.
3. Select a client or search for one in the search bar.
4. The client dashboard is displayed. The Corporate tax returns widget will display all tax returns for this client.

How to view your accounts data in IRIS Elements

There are two ways to view your accounts data in IRIS Elements: from the main dashboard or from a client record.

1. Open IRIS Elements (https://iriselements.io)
2. The dashboard is displayed. Scroll down to the **Accounts Production** widget. The widget will show a summary of the status of your tax returns.
3. Select **View all** .
4. The full list of account data is displayed.

To view your data from a client record:

1. Open IRIS Elements (https://iriselements.io)
2. Select the **Clients** menu from the top bar and then select **Clients list**.
3. Select a client or search for one in the search bar.
4. The client dashboard is displayed. The **Accounts Production** widget will display all accounts for this client.

For more information on the dashboard, the client list and more, go to our Get started with IRIS Elements section of our online Help Centre.

Next steps

Now your data is in IRIS Elements, the next step is to set up the platform for you and any users you are planning to invite.

After your migration

When you have finished migrating all your data - congratulations! You are now a fully migrated user of IRIS Elements.

Contact us via the online form on this page (https://help-iris.co.uk/elements/migrations/ptp-keytime/keytime-after-migration.htm) on our online Help Centre to book an onboarding call and to find links to help content for getting to know IRIS Elements.

If you haven't already, get to know the Elements platform via the help content links below:

Troubleshooting

Check this page for solutions to some common problems while migrating your **Keytime** data into IRIS Elements.

If you are experiencing a problem that is not on this page, please log a support ticket with the IRIS Support team.

For more information on available support, go to Get help and support on our online Help Centre.

Error displayed - The migration details could not be updated

You do not need to try migrating again, but you will have to log a support ticket for IRIS Support, providing the full error message.

Error displayed - The payload is empty. Check that you have linked to the correct database

In the DMA tool, stop the DMA service if it is still running. Go back to the **Connect Tax/Accounts Data** page (depending on what data you are migrating) and make sure the paths are correct. Select **Test Connections**. If the paths turn green, make sure to select **Save** before **Next** and try starting the DMA again. If the paths did not turn green, use the **Browse** button to navigate to the correct location.

Error displayed - Errors detected during client list refresh

This error message is displayed when it is likely the DMA has stopped running. Go back to the DMA and check it is still running, if it has stopped, select **Start DMA Service** again.

Error displayed - Error preparing elements for migrations, or DB Schema version error

This error message is displayed when there is a problem with the DB version you are using. Please do not try to migrate again, instead log a support ticket.

Error displayed - Client ID must be unique/ Duplicate client ID detected

This error message is displayed when the client ID may not be unique within Keytime, or you have more than one product and Elements is attempting to merge client records together. It may be that Elements does not have enough data to match the client to an existing client record.

To fix, firstly check the client id is unique within Keytime. If it is, then add more data to the record (try adding the UTR, NiNo, etc). The more data you have in the original client record, the easier it is for Elements to identify and match this to any other data it is pulling together from Keytime. For more information on this, go to "Preparing to migrate" 4

The DMA is not running, or it runs for a while and then stops.

If you have selected **Start DMA Service**, but the DMA keeps stopping, go back to the previous step and select to **Test Connections**. If the paths turn green, make sure to select **Save** before **Next**. Try the DMA again.

The migration was successful but I can't see any tax returns for a client

This is possibly due to a duplication error. This means that when you migrated your data, there were two (or more) clients with the same client reference or code in Keytime. If possible, check your Keytime data and if this is the case, remigrate your data into Elements with a new client code. If this does not work, [log a support ticket]() with IRIS Support.

Migration FAQs

Migrating your data from Keytime to IRIS Elements may seem like a daunting process and you may have lots of questions. We have tried to answer the most common questions on this page.

There is also lots of information on our website.

If you are experiencing problems, check our "Troubleshooting" 19 page or Get help and support on our online Help Centre.

The following pages detail the step by step process of migration:

- "A timeline of the upgrade and migration process" 2

Account questions

Will switching products affect my Terms and Conditions?

There will be no change to yor terms and conditions, as both products - IRIS Elements and Keytime - are covered by IRIS general Ts&Cs.

Data questions

Will practice data be migrated?

No, Keytime Practice Manager is currently out of scope for migration.

Will online filing passwords be migrated?

No. For security reasons HMRC and Companies House filing credentials cannot be migrated. You will need to have these details to hand as they will need to be entered into IRIS Elements prior to filing any returns or accounts.

Will users be migrated?

No. IRIS Elements handles users and associated sign-on security differently to desktop products, therefore it is not possible to migrate existing user details. Users will need to be setup by the system administrator and appropriate access rights assigned. For more information go to Manage users and subscriptions.

How much client data will be migrated?

Static client details such as name, address, company registration details, UTR, client type and contact details plus details of any relationships you have created between client records are migrated. As well as client information, you can migrate tax returns, VAT obligations and trial balance data from Accounts Production.

How many years worth of tax return data will be migrated?

Tax returns (all types) for years 2020/21, 2021/22, 2022/23 and 2023/24 are migrated.

How many years worth of Keytime Accounts Production data will be migrated?

Current and 4 prior years' trial balance data is migrated.

How many years worth of VAT data will be migrated?

Details of curent and previously submitted VAT obligations are migrated.

Migration process questions

What do I need to do to prepare for migrating my data?

To ensure the best results from your data migration, please ensure you read and follow the steps and advice here: "Migrate Keytime data to IRIS Elements" 1

What is the Data Migration Agent and where do I find it?

The Data Migration Agent (DMA) is an application that forms an essential part of the IRIS Elements data migration solution for IRIS products. It allows you to create a connection between and move data from the databases of PTP to your IRIS Elements account. For more information on the DMA and how to install it, go to "The Data Migration Agent (DMA)" 7.

Can other users in my practice be working while I migrate our data?

You will need to ask all other users to log out of Keytime and IRIS Elements whilst the data migration is running.

Do I need to migrate all my data at once?

You can migrate as much or as little data as you wish. You can migrate individual clients, batches of clients or all clients. You can continue to migrate data after your Keytime licence expires. This allows you full flexibility to plan and execute your migration your way.

Do I have to migrate? Is it mandatory?

Your Keytime products will reach end of life end and will be unsupported after March 2026. We recommend migrating as soon as you can ahead of next busy season.

Can I delay migrating?

We will always try to accommodate requests to postpone the migration where there are extenuating circumstances, but ultimately Keytime will come to end of life in March 2026. Please contact us to discuss options.

Product questions

When will Keytime stop running?

Tax products will come to end of life 31st March 2026, which means the last compliance year will be 2024/25 for the filing deadline 31 January 2026.

Accounts Production (non-Charity formats) products come to an end 31st March 2026. Last accounting data supported for Corporate Tax is April 2026 (ap May 2024/April 2025).

What are the main differences between Keytime and IRIS Elements?

IRIS Elements is a cloud based product. We've created an introductory video to IRIS Elements:

Do I need to install IRIS Elements on my computer?

IRIS Elements is a fully cloud based solution; you access it through your internet browser, there is nothing installed on your PC or servers, no updates or backups to manage. If you currently pay hosting charges, you should consider whether these will be necessary after a move to IRIS Elements.

Can I take a look at IRIS Elements before I decide?

Of course! We have several short video presentations if you just want a quick overview, found here IRIS Elements video library or you can request a demonstration if you need something a bit more in-depth.

How long will you support Keytime for?

Keytime products will be supported until March 2026. The last tax period that can be filed will be the period ending 30 April 2025. The support team will continue to be on hand after that date to assist with migration queries.

How do I train my staff ahead of moving to IRIS Elements?

You can book training with our team, or review our Get started with IRIS Elements help pages and video library.

Support questions

How do I access support if I have a problem?

We have information on contacting support here: Help and support for IRIS Elements.

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Will there be someone I can speak to help me through the migration?

Yes if you have issues during your migration you can contact the support team.

Discontinuing Keytime

Keytime is compliant until 31st March 2026. You will be able to file and submit tax returns for tax year 24/25 until then. Tax returns for 25/26 should be filed and submitted in IRIS Elements.

Your Keytime data will become read only on 1st April 2026. This means you can view your data in Keytime but you won't be able to do anything in the product.

It is your responsibility to make sure your data has been moved out of Keytime. For information on migrating your data to IRIS Elements, go to our help content.

What does read-only mean?

Your data will be viewable, and you will still be able to migrate it to IRIS Elements.

We cannot guarantee the future availability of an installation of Keytime. This means, while you have Keytime installed on your computer, you will be able to view the data stored there. If you get a new computer, or your system is damaged in some way, we can't guarantee you will be able to install another version of Keytime or access your previous data.

Contact us about your upgrade

There are different ways to contact the team, depending on whether or not you're currently eligible to upgrade.

If you have been invited to upgrade

If you have been invited to upgrade and have questions about the process, email migrations-elements@iris.co.uk - a member of the team will get back to you.

If you haven't been invited to upgrade

If you haven't been invited to upgrade yet, but you're interested in migrating soon, you can register your interest on our website. A member of the team will get back to you.

If you are having problems with your upgrade

Contact our support teams using IRIS Service Community.

For other queries relating to your current Keytime product, contact Keytime support.