

MYOB MyStaffInfo

User Guide

2019.01

myob

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Introduction to MYOB MyStaffInfo

MYOB MyStaffInfo is an add-on to the MYOB Exo Employer Services suite. Once installed, it appears under the Pay menu in MYOB Exo Payroll.

Its primary functions are to:

- Assign groups of employees to managers, thereby allowing managers to review activity that is specific to their assigned employees on the website
- Select employees for inclusion onto the MyStaffInfo website
- Select managers for inclusion onto the MyStaffInfo website
- Set security restrictions for each login
- Setup documents for upload to the website
- Setup Timesheet Batches for use on the website
- Retrieve timesheet transactions from the website and import them into the Current Pay

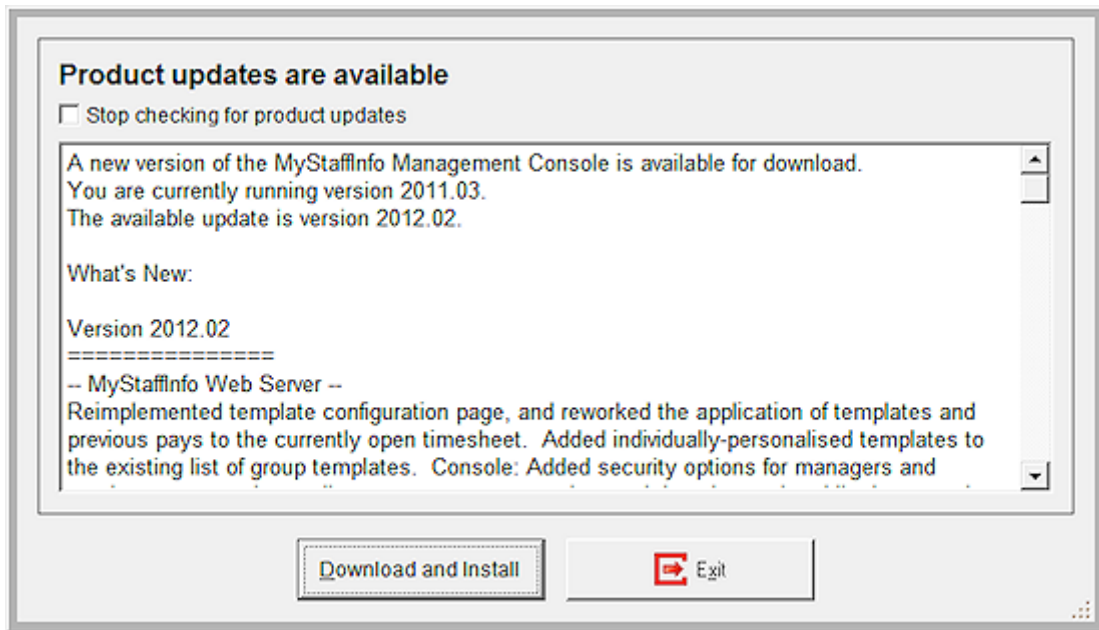
Management Console

Management Console

From the Login screen of MYOB Exo Payroll, log in to your payroll company as you would normally, then from the Pay menu select **MyStaffInfo**.

New Update Available

If your current version of the Management Console is out-of-date, an update window will open, prompting for the new update to be installed:



Click **Download and Install** to initiate the update, or click **Exit** to close the window without updating. This update can be implemented the next time the Management Console is opened.

To disable this automatic update notification, tick the **Stop checking for product updates** checkbox.

NOTE: It is not advisable to disable the automatic update function; however it can be reactivated from the **Preferences window (see page 21)**.

MyStaffInfo First Steps

When **MyStaffInfo** is selected from the main menu of MYOB Exo Payroll, the Management Console will open with the First Steps screen.



Here you will see the tasks required to get the MyStaffInfo website up and running.

The process of circulating data between Exo Payroll and the MyStaffInfo website involves:

- selecting employees for inclusion onto the website
- configuring login accounts and access rights
- importing timesheet data into the Current Pay
- synchronising payroll information with website information.

The data circulation process is, by nature, task driven. Tasks should be performed in the order specified, reading from top to bottom, out of the list of Common Tasks, e.g. select employees, then select managers, and so on.

You can step through the various options by task:

Set up MyStaffInfo users

- Add/Remove employees as MyStaffInfo users (see page 5)
- Add/Remove payroll users as MyStaffInfo users (see page 7)

Set up managers and employee groups

- Select managers for MyStaffInfo (see page 11)
- Add/Remove MyStaffInfo employee groups (see page 14)
- Assign employees to employee groups (see page 16)
- Assign employee groups to managers (see page 17)

Set up security for MyStaffInfo users


- Assign security settings to MyStaffInfo users (see page 20)

Synchronise your payroll information with the website

- Synchronise your payroll information with MyStaffInfo (see page 23)

Alternatively, you can step through the various options by layout:

- Common Tasks (see page 4)
- Leave Requests (see page 31)
- Timesheet (see page 27)

Click the **Exit** task to return to the Exo Payroll main menu. Alternatively, click the Close  button at the top right.

Common Tasks

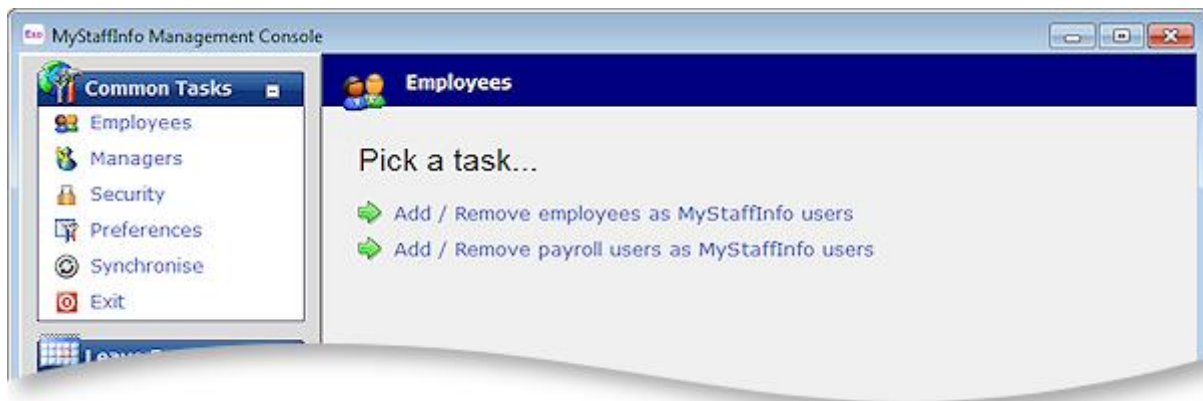
The Common Tasks pane serves two purposes:

- When selecting a Common Task, the appropriate screen loads to the right of the Task pane
- A set of hyperlinks to a group of related tasks appears at bottom left

If you want to achieve an employee-related task and can't see a way to do so in the main screen of the Management Console, look to the group of related tasks for more information. In this way you can access the Employee and User Security maintenance forms directly from the console, without having to exit to the main menu and navigate to those screens in Exo Payroll.

Employees

From the Common Tasks pane, click the Employees task. The Employee tasks open in the task window on the right.



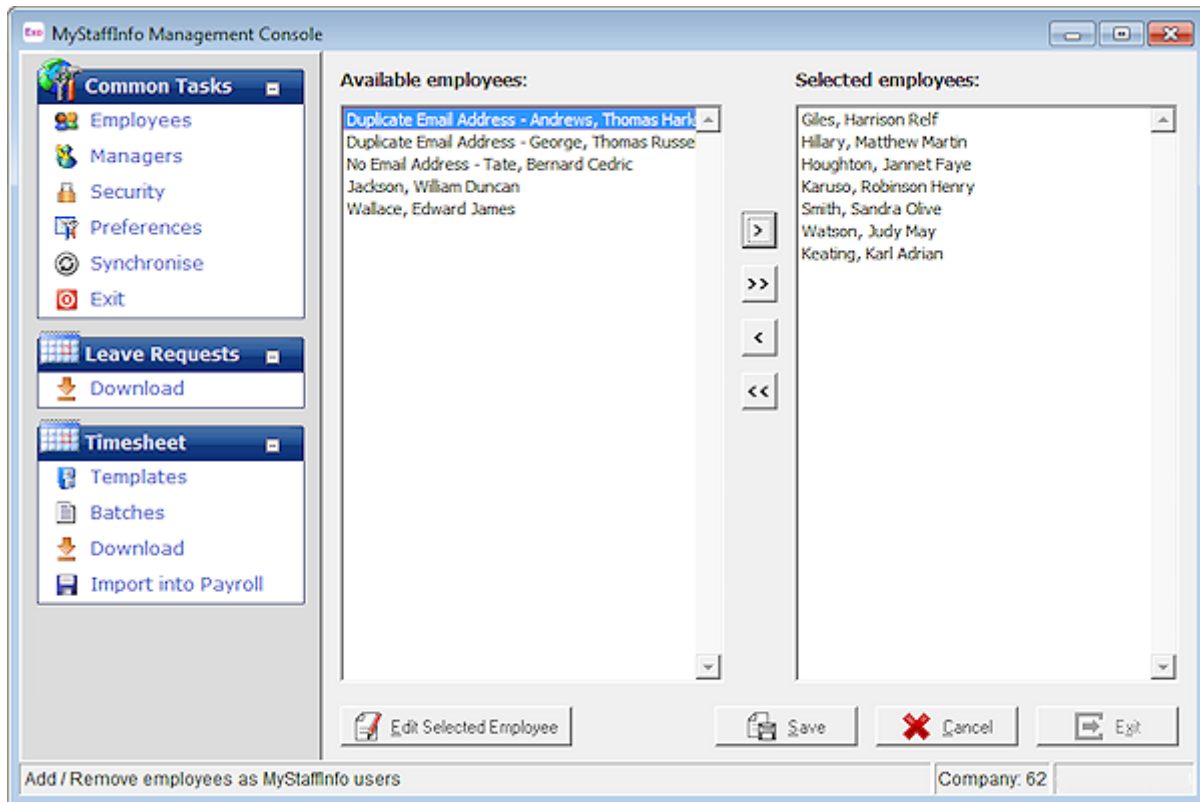
From this window, you can pick a task:

- Add/Remove employees as MyStaffInfo users (see page 5)
 - This is where you select the employees whose information will be available in MyStaffInfo
- Add/Remove payroll users as MyStaffInfo users (see page 7)
 - This is where you select the users of the Exo Payroll system whose information will be available on the MyStaffInfo website.

Add/Remove employees as MyStaffInfo users

Common Tasks > Employees > Add/Remove employees as MyStaffInfo users

This is the first task in the Employees group, and is where you select the employees whose information will be available on MyStaffInfo. Any employee who is not selected for inclusion will not be provided a login account to the website. Similarly, any employee who is not selected for inclusion cannot be accorded "Manager (see page 10)" status.



Available employees

To move an employee/s from the Available window to the Selected window:

- select the employee(s) and then click the [**>**] button
- click the [**>>**] button (this will assign all employees) - use this button with caution
- select the employee(s) and drag the selection to the Selected employees window.

NOTE: If an employee cannot be moved, it's because they have details missing.

Selected employees

To move an employee/s from the Selected window to the Available window:

- select the employee/s and then click the [**<**] button
- click the [**<<**] button (this will remove all employees) - use this button with caution
- select the employee/s and drag the selection to the Available employees window.

TIP: To select more than one employee for inclusion or removal, hold down the **CTRL** key while selecting employees. To select a group, click on the first employee name then hold down the **Shift** key and click a name further down the list. A combination of these methods can be used, just remember to hold down **CTRL** when selecting more, otherwise your selection will be lost.

Once finished, click the **Save** button to commit your changes to the selected employees list.

Click **Cancel** to discard your changes.

Click the **Exit** button to return to the Management Console.

NOTE: if you have made any changes, the **Exit** button will be unavailable until you save or cancel your changes.

Edit Selected Employee

Some employees cannot be moved to the selected employees side of the list. If this is the case, the employee details are incomplete. The most likely cause is that there is a required field for the current employee that is either empty or whose value is being used by another employee. To correct this, you can highlight the employee in question and click the **Edit Selected Employee** button.

The screenshot shows the 'Employee Maintenance' window with the following data:

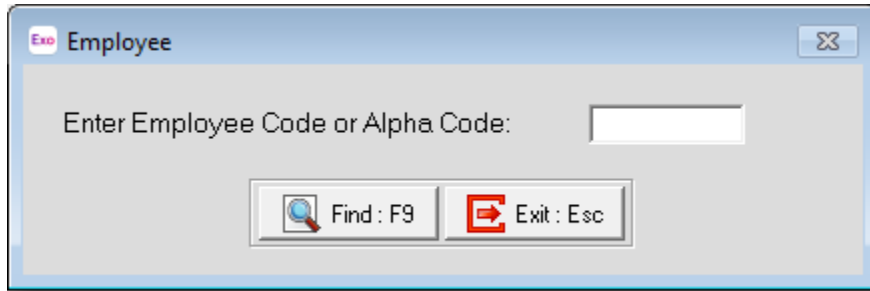
Employee Details	Leave Entitlements	Other	User Defined	Notes	Standard Pay
Required Information					
Code:	2				
Surname:	Andrews				
First Names:	Thomas Harley				
Alpha Code:	ANDREWS				
Start Date:	02/01/1999				
Cost Centre:	2210 ... NSW/Accounts				
Department:	2 ... Accounts				
Pay Frequency:	Weekly				
Payslip Name:	Tom Andrews				
Address Line 1:	401 High Street				
Address Line 2:					
Suburb:	Pennith				
State:	NSW ... Post Code: 2750				
Country:	Australia				
Telephone:	(02) 9933 447				
Mobile:					
Occupation:	Accounts Clerk				
<input type="checkbox"/> Apprentice					
Tax Classification					
TFN:	112112101 FTB 0				
Standard Employee					
Medicare Exemption:	None Scale 7				
<input checked="" type="checkbox"/> Claim Tax Free Threshold <input type="checkbox"/> Leave Loading					
<input type="checkbox"/> Earnings are Not Liable for Payroll Tax					
WorkCover:	3498 ... <input checked="" type="checkbox"/> Use WorkCover rate				
Male ... Part-time					
Wage ... Permanent					
Hours Per Pay Period:	24.00				
<input type="checkbox"/> Proprietor					
Birth Date:	21/12/1977 Age: 34.1				
Due Back Date:	//				
Annual Review:	//				
<input type="button" value="Prev : F7"/> <input type="button" value="Next : F8"/> <input type="button" value="Find : F9"/> <input type="button" value="Save : F10"/> <input type="button" value="Delete : F6"/> <input type="button" value="Exit : Esc"/>					

Press **Save** or **F10** to commit your changes to the Employee Maintenance screen.

Employee Maintenance Buttons

Prev : F7 / Next : F8 - Use these keys to scroll through employee records, as the button names imply: **Previous** or **Next**.

Find : F9 - Clicking this button or pressing F9 opens the Employee search window:



Enter the Employee Code or Alpha Code to search for. Press **F9** again to search for this employee or press ESC or the **Exit** button to cancel the search.

Save : F10 - Once finished, click the **Save** button to commit your changes to the selected employee.

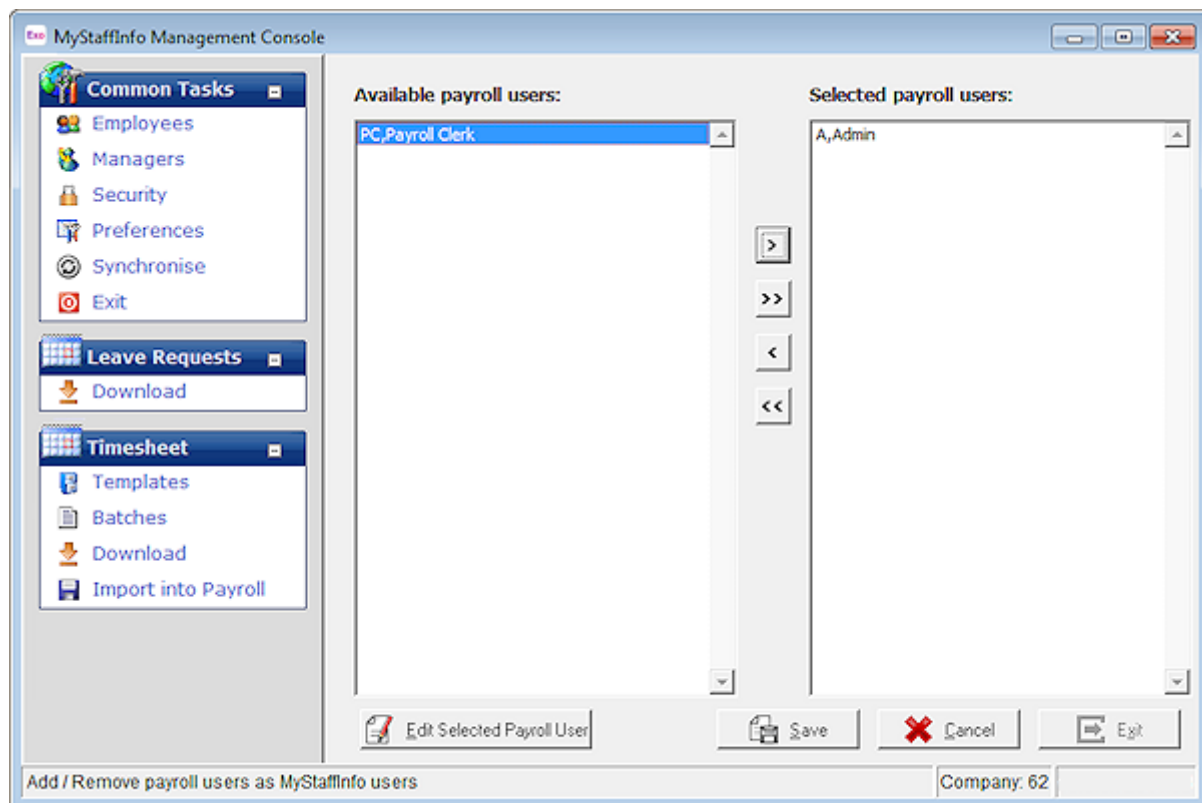
Delete : F6- Delete the current employee. This is only available if the **Employee Details** tab is selected.

Exit : Esc - Click to return to the Management Console.

Add/Remove payroll users as MyStaffInfo users

Common Tasks > Employees > Add/Remove payroll users as MyStaffInfo users

This is the second task in the Employees group, and is where you select the users of the Exo Payroll system whose information will be available on the MyStaffInfo website (see page 35). Any user who is not selected for inclusion will not be provided a login account to the website. Similarly, any user who is not selected for inclusion cannot be accorded "Manager" status (see page 10).



Available payroll users

To move a user from the Available window to the Selected window:

- select the user and then click the [**>**] button
- click the [**>>**] button (this will assign all users)
- select the user and drag the selection to the Selected payroll users window.

NOTE: If a user cannot be moved, it's because they have details missing.

Selected payroll users

To move a user from the Selected window to the Available window:

- select the user and then click the [**<**] button
- click the [**<<**] button (this will remove all users)
- select the user and drag the selection to the Available payroll users window.

TIP: To select more than one employee for inclusion or removal, hold down the **CTRL key** while selecting employees. To select a group, click on the first employee name then hold down the **Shift key** and click a name further down the list. A combination of these methods can be used, just remember to hold down **CTRL** when selecting more, otherwise your selection will be lost.

Once finished, click the **Save** button to commit your changes to the selected payroll users list.

Click **Cancel** to discard your changes.

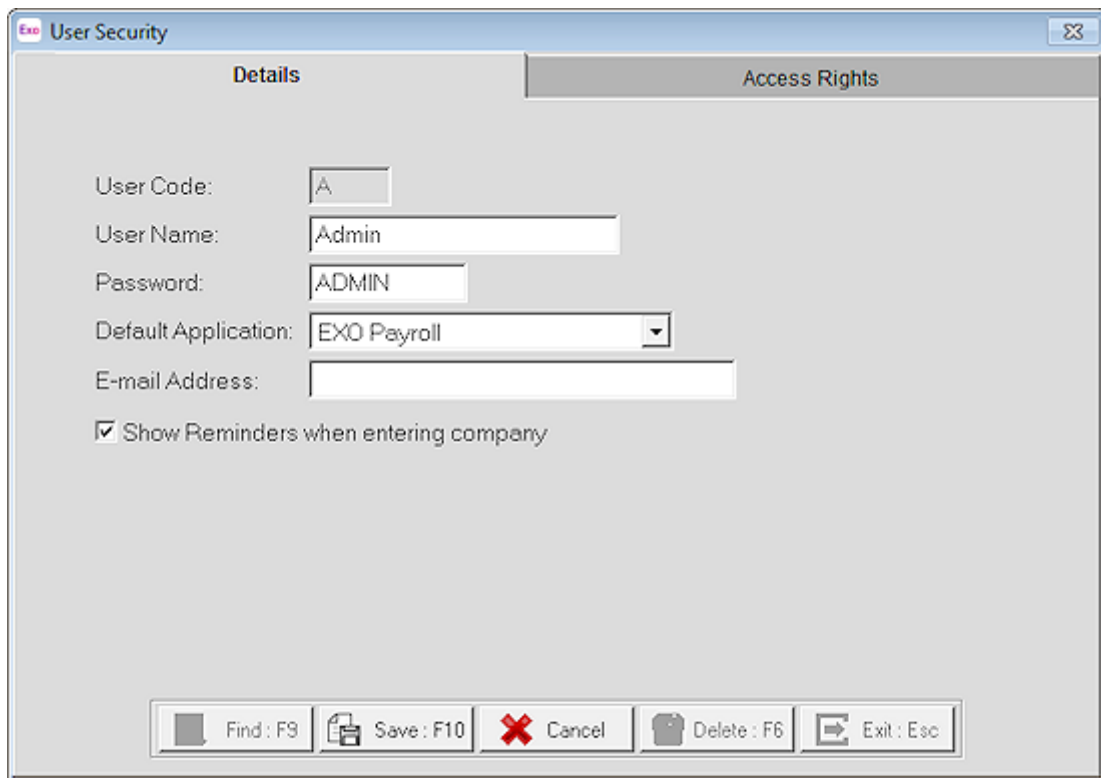
Click the **Exit** button to return to the management console.

NOTE: if you have made any changes, the **Exit** button will be unavailable until you save or cancel your changes.

Edit Selected Payroll User

Some users cannot be moved to the selected side of the mover-list. The most likely cause is that there is a required field for the current user that is either empty or whose value is being used by another user. To correct this, you can highlight the user in question and click the **Edit Selected Payroll User** button.

Enter the desired User Code and press the tab key to view the user's details.



The screenshot shows a 'User Security' dialog box with two tabs: 'Details' and 'Access Rights'. The 'Details' tab is active. The form contains the following fields and controls:

- User Code: A
- User Name: Admin
- Password: ADMIN
- Default Application: EXO Payroll (dropdown menu)
- E-mail Address: (empty text box)
- Show Reminders when entering company

At the bottom of the dialog box, there is a row of five buttons: Find (F9), Save (F10), Cancel, Delete (F6), and Exit (Esc).

In this example, the required fix is to enter a unique password for the user.

Find : F9 - Clicking this button opens a picklist to search for users.

Save : F10 - Once finished, click the Save button to commit your changes.

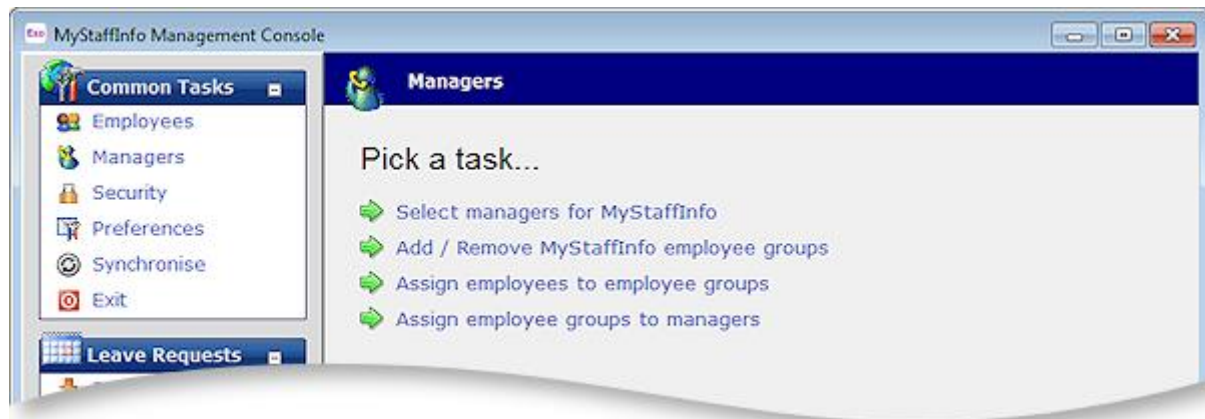
Cancel - Click to discard your changes.

Delete : F6 - Delete the selected payroll user from the system.

Exit : Esc - Click to return to the management console.

Managers

From the Common Tasks pane, click the Manager task. The Manager tasks are listed.

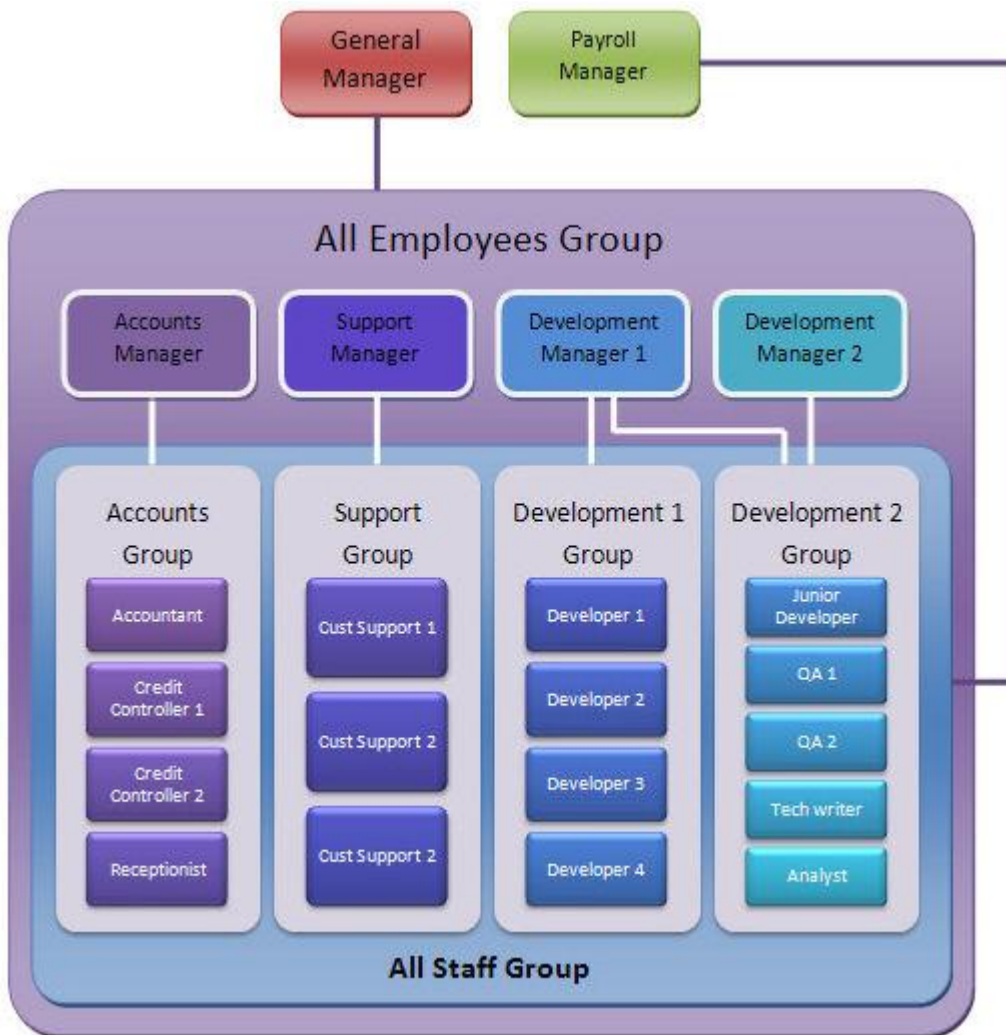


- Select managers for MyStaffInfo (see page 11)
 - This is where you select the employees who are to be granted Manager status.
- Add/Remove MyStaffInfo employee groups (see page 14)
 - This is where you define employee groups, names for sets of your employees, so that each employee group can be allocated to a manager.
- Assign employees to employee groups (see page 16)
 - This is where you classify employees into the predefined employee groups.
- Assign employee groups to managers (see page 17)
 - This is where you match employee groups with managers. A manager may preside over more than one employee group.

NOTE: When setting up MyStaffInfo for the first time, we recommend following the sequence above. This is necessary as each step is a prerequisite of the next.

Relationships

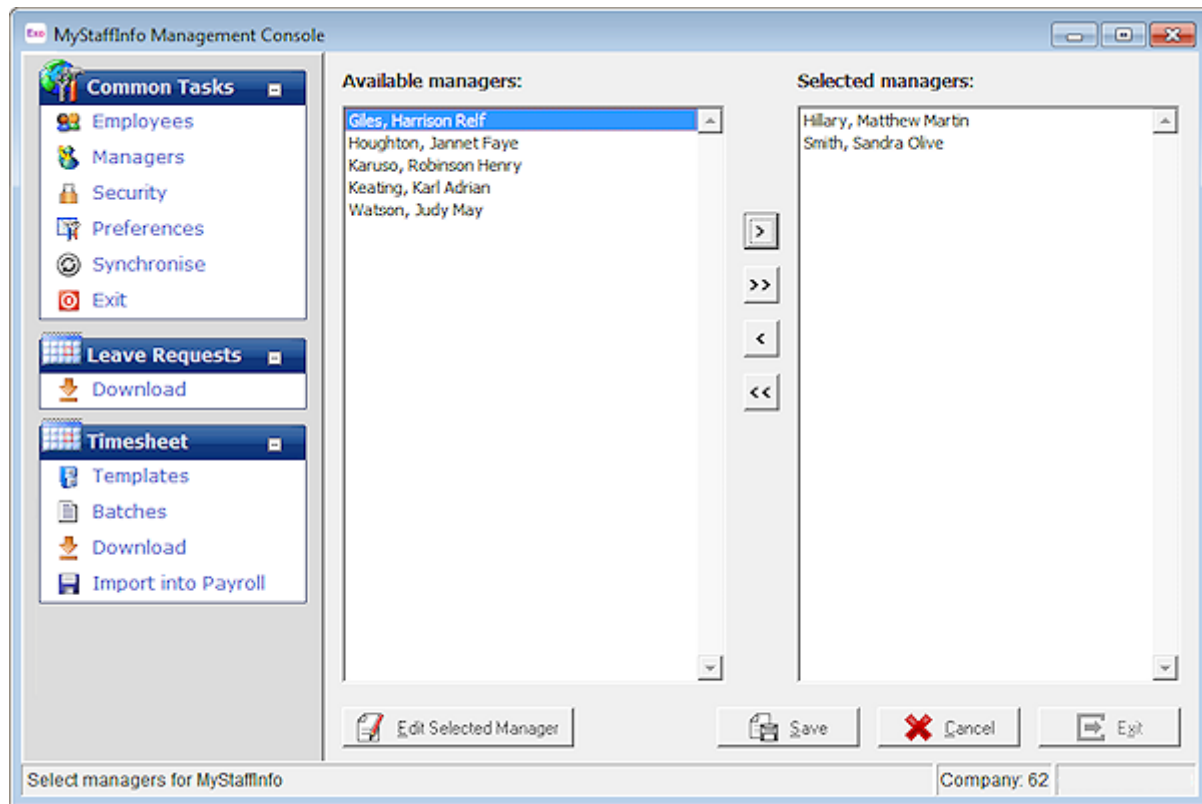
The diagram below provides an example of how you could assign staff to groups and then assign these staff groups to the relevant managers.



Select managers for MyStaffInfo

Common Tasks > Managers > Select managers for MyStaffInfo

This is the first task in the Managers group, and is where you select the employees who are to be granted "Manager" status.



Employees who are marked as managers have the extra ability to review and amend data for several employees, i.e. their subordinates, across the Internet - this is in addition to reviewing their own personal data.

For example, a Manager can:

- Review, amend and approve timesheet transactions
- Receive, approve and/or decline Leave Requests
- Review contact details

Points to note:

- A manager is limited to seeing data only for the employees that have been assigned to an employee group
- A manager may be responsible for more than one employee group
- A manager is limited to seeing data only for the employee group(s) that he or she been assigned to
- Employees who are not marked as managers cannot be allocated employee groups.

Adding or Removing Managers

Available managers

To move a manager from the Available window to the Selected window:

- select the manager and then click the [**>**] button
- click the [**>>**] button (this will assign all managers)
- select the manager and drag the selection to the Selected managers window.

NOTE: If a manager cannot be moved, it's because they have details missing.

Selected managers

To move a manager from the Selected window to the Available window, you can:

- select the manager and then click the [**<**] button
- click the [**<<**] button (this will remove all managers)
- select the manager and drag the selection to the Available managers window.

TIP: To select more than one employee for inclusion or removal, hold down the **CTRL key** while selecting employees. To select a group, click on the first employee name then hold down the **Shift key** and click a name further down the list. A combination of these methods can be used, just remember to hold down **CTRL** when selecting more, otherwise your selection will be lost.

Once finished, click the **Save** button to commit your changes to the selected payroll users list.

Click **Cancel** to discard your changes.

Click the **Exit** button to return to the management console.

NOTE: if you have made any changes, the **Exit** button will be unavailable until you save or cancel your changes.

Edit Selected Manager

Some managers cannot be moved to the Selected side of the mover-list. The most likely cause is that there is a required field for the current manager that is either empty or whose value is being used by another. To correct this, you can highlight the manager in question, and then click the **Edit Selected Manager** button.

The screenshot shows the 'Employee Maintenance' window with the 'Employee Details' tab selected. The form is divided into two main sections: 'Required Information' and 'Tax Classification'.

Required Information:

- Code: 2
- Surname: Andrews
- First Names: Thomas Harley
- Alpha Code: ANDREWS
- Start Date: 02/01/1999
- Cost Centre: 2210 NSW/Accounts
- Department: 2 Accounts
- Pay Frequency: Weekly
- Payslip Name: Tom Andrews
- Address Line 1: 401 High Street
- Address Line 2:
- Suburb: Penrith
- State: NSW Post Code: 2750
- Country: Australia
- Telephone: (02) 9933 447
- Mobile:
- Occupation: Accounts Clerk
- Apprentice

Tax Classification:

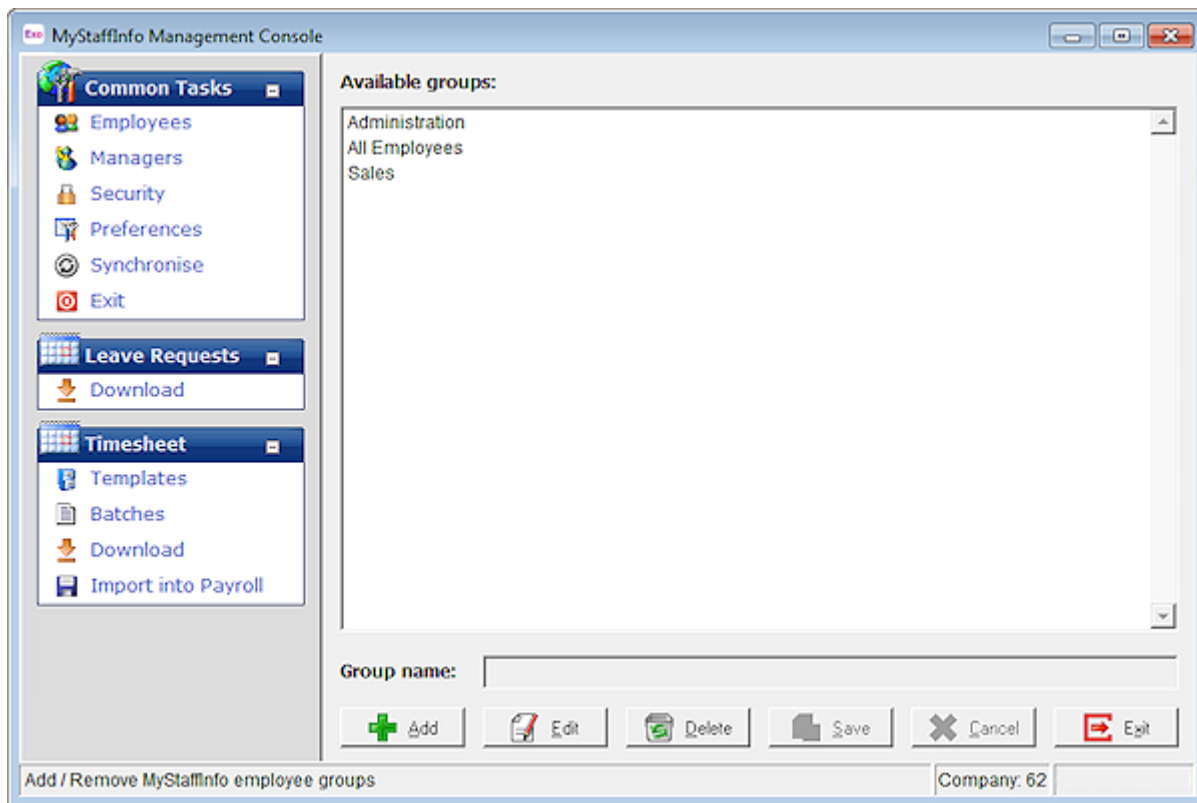
- TFN: 112112101 FTB: 0
- Standard Employee (dropdown)
- Medicare Exemption: None Scale 7
- Claim Tax Free Threshold Leave Loading
- Earnings are Not Liable for Payroll Tax
- WorkCover: 3498 Use WorkCover rate
- Male (dropdown) Part-time (dropdown)
- Wage (dropdown) Permanent (dropdown)
- Hours Per Pay Period: 24.00
- Proprietor
- Birth Date: 21/12/1977 Age: 34.1
- Due Back Date: //
- Annual Review: //

At the bottom of the form, there is a navigation bar with the following buttons: Prev: F7, Next: F8, Find: F9, Save: F10, Delete: F6, and Exit: Esc.

Click **Save** or press F10 to commit your changes.

Add/Remove MyStaffInfo employee groups

Common Tasks > Managers > Add/Remove MyStaffInfo employee groups



The second task in the Managers group and where you define names for sets of your employees, so that each employee group can be allocated to a manager. Note that only managers can approve timesheet entries. In addition this restricts managers from seeing timesheet entries for employees not in their team, which is recommended. The employee group should be given a meaningful name, typically after the manager, branch or department.

By default, MyStaffInfo provides one group, e.g. "All Employees". In this arrangement, one Manager reviews the website data for all of the employees in the payroll company. See the relationships (see page 10) block diagram for an overview of this.

However, when defining employee groups for larger companies, you will need to consider individuals responsible for reviewing timesheets. For example, if your company has six departments, a suitable arrangement may be to create six managers and six employee groups, with one group allocated to each manager. Using this principle, managers will only see website data for employees that they preside over.

NOTE: You may elect to use a combination of both methods – for example, via the "All Employees" employee group, a general manager or payroll clerk (who is marked as a manager) may be able to approve timesheet entries if the designated manager is not present on payday.

Group Name

This is where you would enter a meaningful name for the employee group.

Add Click the Add button to create a new employee group – the cursor will be placed into the Group Name field. Once you have entered the name, click the Save button to confirm your changes.

Edit Click the Edit button to alter the name of an existing employee group. Once you have keyed over the name, click the Save button to confirm your changes.

Delete Click the Edit button to remove a group permanently.

Save Click the Save button to confirm an Add or Edit operation.

Cancel Click the Cancel button to revert an Add or Edit operation, i.e. revert back to the original group name.

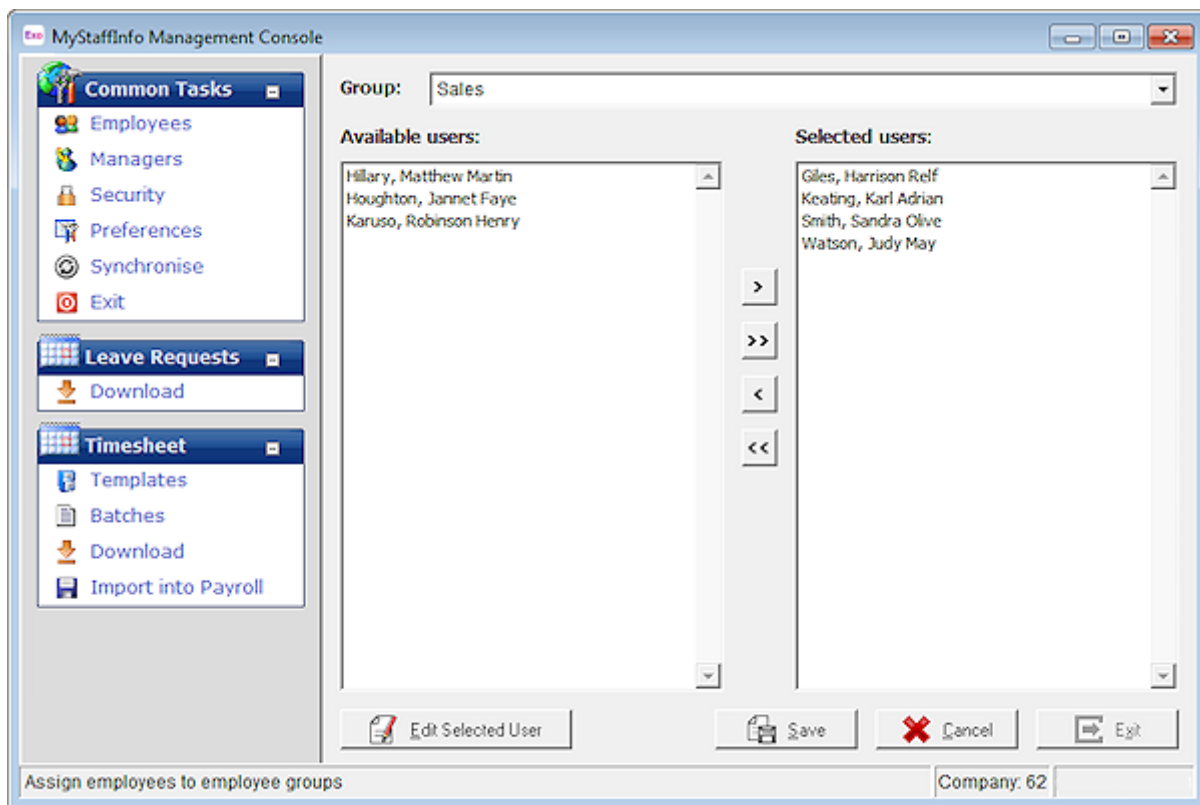
Exit Click the Exit button to return to the Managers task list.

Assign employees to employee groups

Common Tasks > Manager > Assign employees to employee groups

This is the third task in the Managers group, and is where you classify employees into employee groups. An employee may appear in more than one employee group.

NOTE: Managers should not be members of any group that they manage. This will interfere with the security settings that affect managers' ability to edit group members' details.



Group Ensure that you have the correct group, before attempting to select employees for that group. The mover list will not be enabled until you have selected a group for which to perform maintenance.

Available users

To move a user from the Available window to the Selected users window:

- select the user and then click the [**>**] button
- click the [**>>**] button (this will assign all users)
- select the user and drag the selection to the Selected users window.

Selected users

To move a user from the Selected users window to the Available users window:

- select the user and then click the [**<**] button
- click the [**<<**] button (this will assign all users)
- select the user and drag the selection to the Available users window.

TIP: To select more than one employee for inclusion or removal, hold down the **CTRL** key while selecting employees. To select a group, click on the first employee name then hold down the **Shift** key and click a name further down the list. A combination of these methods can be used, just remember to hold down **CTRL** when selecting more, otherwise your selection will be lost.

Once finished, click the **Save** button to commit your changes to the selected users list.

Click **Cancel** to discard your changes.

Click the **Exit** button to return to the management console.

Edit Selected User

Some users cannot be moved to the Selected side of the mover-list. The most likely cause is that there is a required field for the current user that is either empty or whose value is being used by another user. To correct this, you can highlight the user in question, and then click the **Edit Selected User** button.

The screenshot shows the 'Employee Maintenance' window with the following data:

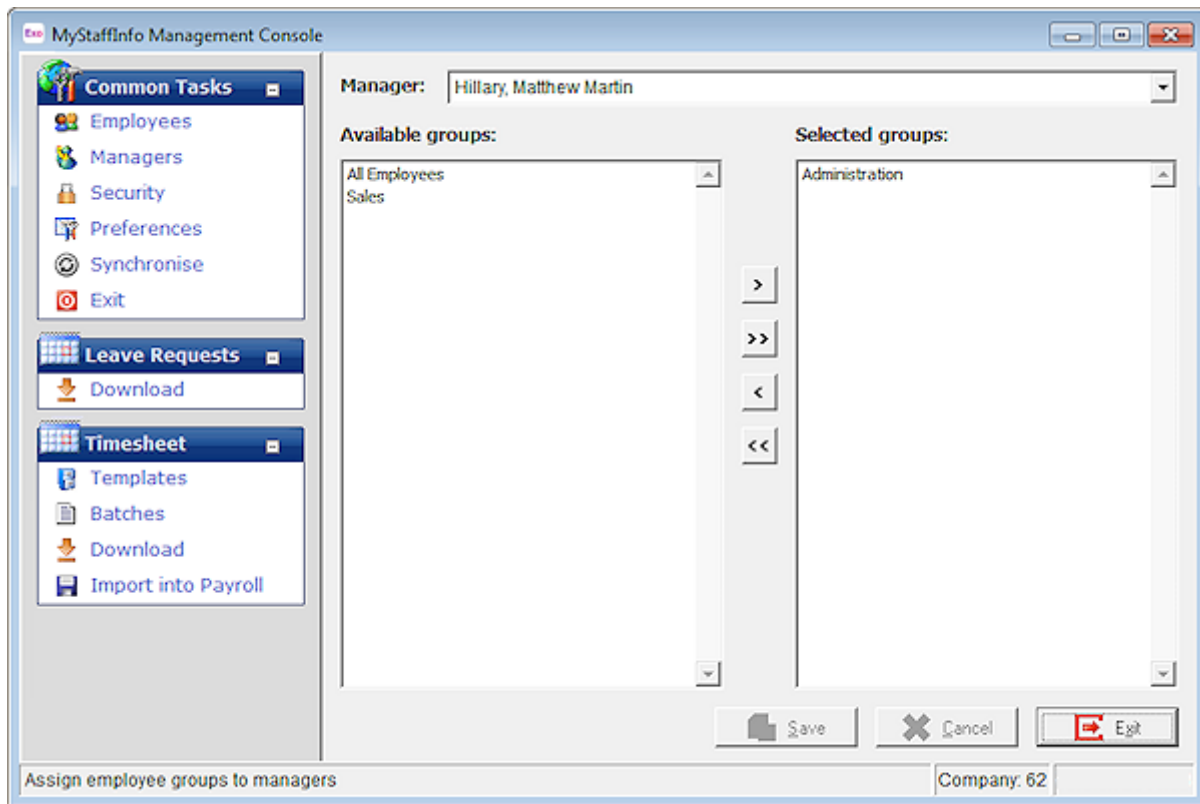
Employee Details	Leave Entitlements	Other	User Defined	Notes	Standard Pay
Required Information					
Code:	2				
Surname:	Andrews				
First Names:	Thomas Harley				
Alpha Code:	ANDREWS				
Start Date:	02/01/1999				
Cost Centre:	2210 ... NSW/Accounts				
Department:	2 ... Accounts				
Pay Frequency:	Weekly				
Payslip Name:	Tom Andrews				
Address Line 1:	401 High Street				
Address Line 2:					
Suburb:	Penrith				
State:	NSW				
Post Code:	2750				
Country:	Australia				
Telephone:	(02) 9933 447				
Mobile:					
Occupation:	Accounts Clerk				
<input type="checkbox"/> Apprentice					
Tax Classification					
TFN:	112112101				
FTB:	0				
Standard Employee					
Medicare Exemption:	None				
Scale:	7				
<input checked="" type="checkbox"/> Claim Tax Free Threshold <input type="checkbox"/> Leave Loading					
<input type="checkbox"/> Earnings are Not Liable for Payroll Tax					
WorkCover:	3498 ...				
<input checked="" type="checkbox"/> Use WorkCover rate					
Gender:	Male				
Employment Type:	Part-time				
Wage:	Permanent				
Hours Per Pay Period:	24.00				
<input type="checkbox"/> Proprietor					
Birth Date:	21/12/1977				
Age:	34.1				
Due Back Date:	//				
Annual Review:	//				
<input type="button" value="Prev : F7"/> <input type="button" value="Next : F8"/> <input type="button" value="Find : F9"/> <input type="button" value="Save : F10"/> <input type="button" value="Delete : F6"/> <input type="button" value="Exit : Esc"/>					

Press **Save** or **F10** to commit your changes to the Employee Maintenance screen.

Assign employee groups to managers

Common Tasks > Manager > Assign employee groups to managers

This is the fourth Task in the Managers Group, and is where you match employee groups with managers. A manager may preside over more than one employee group.



Manager Ensure that you have the correct manager before attempting to select groups for that manager. The mover-list will not be enabled until you have selected a manager for which to perform maintenance.

Available groups

To move a group from the Available window to the Selected window:

- select the group and then click the [**>**] button
- click the [**>>**] button (this will assign all users) - use this button with caution
- select the group and drag the selection to the Selected groups window.

Selected groups

To move a group from the Selected window to the Available window:

- select the group and then click the [**<**] button
- click the [**<<**] button (this will assign all users) - use this button with caution
- select the group and drag the selection to the Available groups window.

TIP: To select more than one employee for inclusion or removal, hold down the **CTRL** key while selecting employees. To select a group, click on the first employee name then hold down the **Shift** key and click a name further down the list. A combination of these methods can be used, just remember to hold down **CTRL** when selecting more, otherwise your selection will be lost.

MYOB MyStaffInfo

Once finished, click the **Save** button to commit your changes to the selected mover list.

Click **Cancel** to discard your changes.

Click the **Exit** button to return to the management console.

Security





Overview


MYOB MyStaffInfo provides extensive controls over what the employee is permitted and is not permitted to see, via the "tree view" at right. Check or uncheck boxes in the tree view to grant or prevent the viewing components on the website.

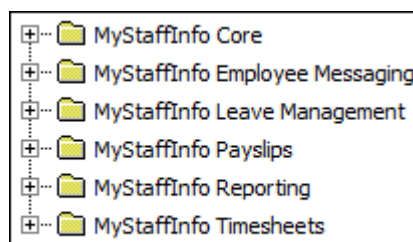
The assignment of security options is task-driven. The recommended course of action is to:


- Grant access to commonly used components, to all users at once, taking special care to ensure that restricted items are not selected.
- Tailor specific access requirements to individual users as necessary, refining the lists of previously-ticked components from a), one employee at a time.
- If you want to define access rights for Users of the system who are not payroll employees of the Payroll Company in question, you can also elect options either globally or individually, for user-based logins, without altering the access rights for employee-based logins.

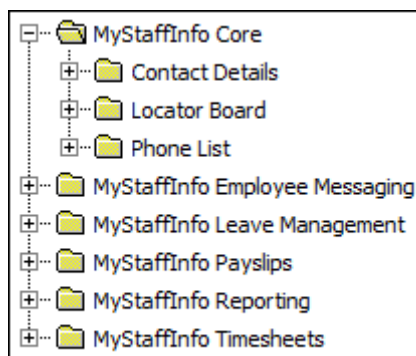
Tree View

User security is laid out by means of a "tree view" which lists all possible security options relating to the MyStaffInfo website (see page 35). Click the box next to an item with  symbols to enable or disable access to that item. Click the box next to the  symbols to enable or disable access to all items of that category. Click the  or  symbols to hide or show all items in that category.

Where a  icon appears, it means that the folder icon will be closed and that there are branches underneath the current branch which are not currently visible. For example, here is a fully collapsed tree view:



To expand the tree view and see the hidden components, click the  icon:



To collapse the tree view, click the  icon.

All

This will automatically place ticks in every possible component of MyStaffInfo, thus granting the user full access to all areas. The user will be able to see all of their personal information plus all of the general company information.

None

This will automatically remove ticks in from every possible component of MyStaffInfo, thus declining the employee/user access to MyStaffInfo.

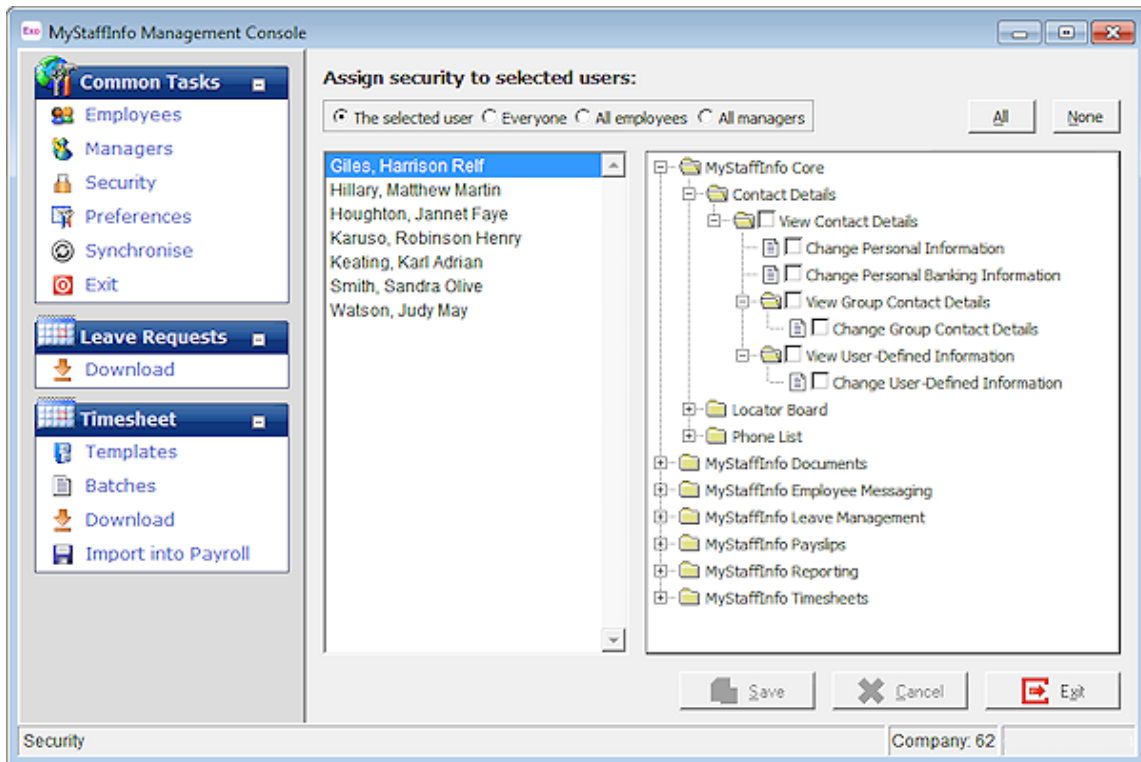
Assign security settings to MyStaffInfo users

Common Tasks > Security

From the Common Tasks pane, click the Security task. The Security allocation controls open.

Assign security to the selected users

This is the first option that is accessible from the options list. Highlight the desired user, then tick the appropriate boxes at right to grant or deny access rights (see page 19) to that user, remembering to click the **Save** button to confirm your changes. You will then be able to highlight each user in succession, and appoint access rights. Take care to examine the contents of all relevant page tabs.



Assign security to everyone

This is the second option that is accessible from the options list at top centre. Selecting this option will result in an index of all users (meaning both payroll users and employees) to appear below the options list.

NOTE: As this is a "global" change to the access rights for users, regardless of their status, we recommend assigning these rights first then moving onto the group rights, all employers and all managers, then lastly onto individual rights.

Tick the appropriate boxes at right to assign the same access rights (see page 19) to all users. Click the **Save** button to confirm your changes.

Assign security to all employees

This is the third option that is accessible from the options list at top centre. Selecting this option will cause your payroll employees to appear, below the options list.

Tick the appropriate boxes at right, in order to appoint the same access rights (see page 19) to all employees. Then click the Save button to confirm your changes.

Assign security to all managers

This is the fourth option that is accessible from the options list at top centre. Selecting this option will cause your managers to appear below the options list.

Tick the appropriate boxes at right, in order to appoint the same access rights (see page 19) to all managers. Then click the Save button to confirm your changes.

Once finished, click the **Save** button to commit your changes to the tick-boxes.

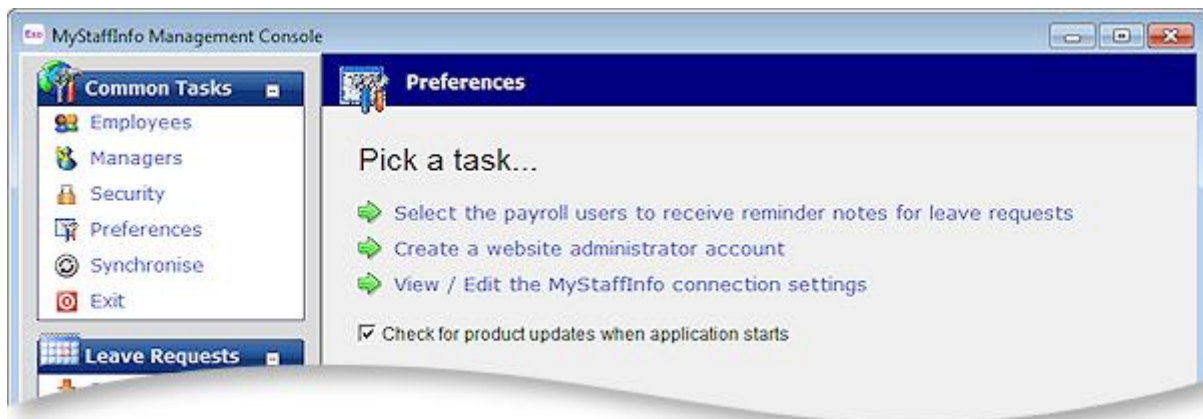
Click **Cancel** to discard your changes.

Click the **Exit** button to return to the Management Console.

Preferences

Common Tasks > Preferences

This screen contains customisation options relating to the MyStaffInfo website (see page 35). From the Common Tasks pane, select the Preferences task.

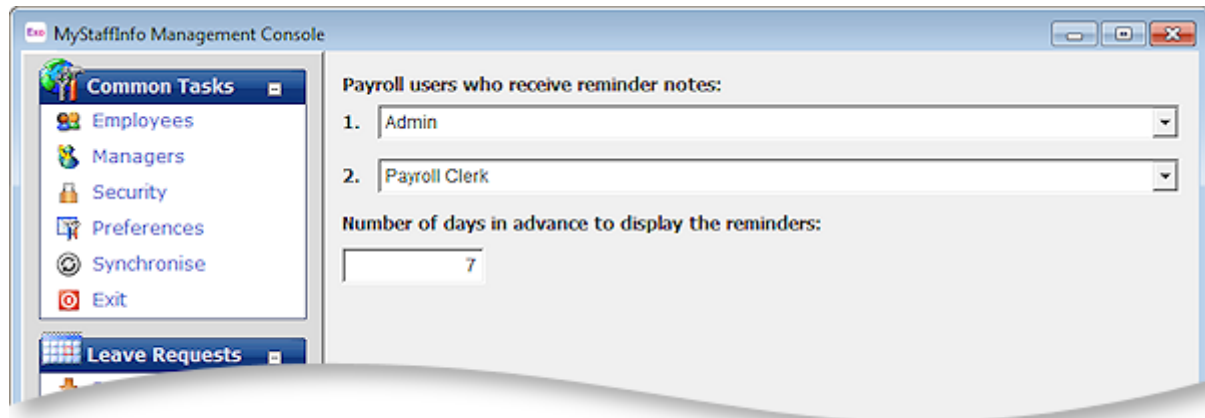


- Select the payroll users to receive reminder notes for leave requests (see page 21)
 - The Payroll users who are assigned here will receive reminders whenever any employee's leave requests have been approved by the appropriate manager via the MyStaffInfo website.
- Create a website administrator account (see page 22)
 - Use this option to create a website administrator account.
- View/Edit the MyStaffInfo connection settings (see page 22)
 - These settings should only be altered under the direct guidance of the Help desk.

Select the payroll users to receive reminder notes for leave requests

Common Tasks > Preferences > Select the payroll users to receive reminder notes for leave requests

The Exo Payroll users who are assigned here will receive reminders whenever any employee's leave requests have been approved by the appropriate manager via the MyStaffInfo website (see page 35).



Payroll users who receive reminder notes Select a first (and optionally, a second) user by clicking on the respective list boxes.

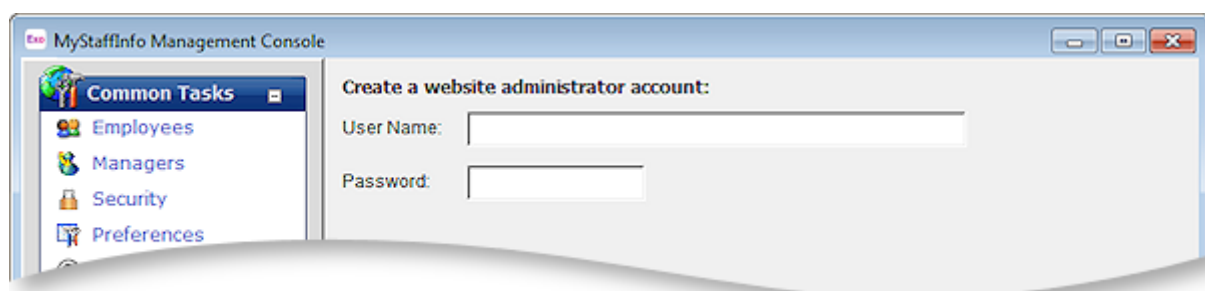
Ideally, the person processing the leave request would be the person who is processing the Current Pay, such a payroll clerk, or someone reporting to a payroll clerk.

Number of days in advance to display the reminders Generally for a weekly frequency, this would be seven days.

Create a website administrator account

Common Tasks > Preferences > Create a website administrator account

From the Common Tasks pane, select the Preferences task. Select the Create a website administrator account option.



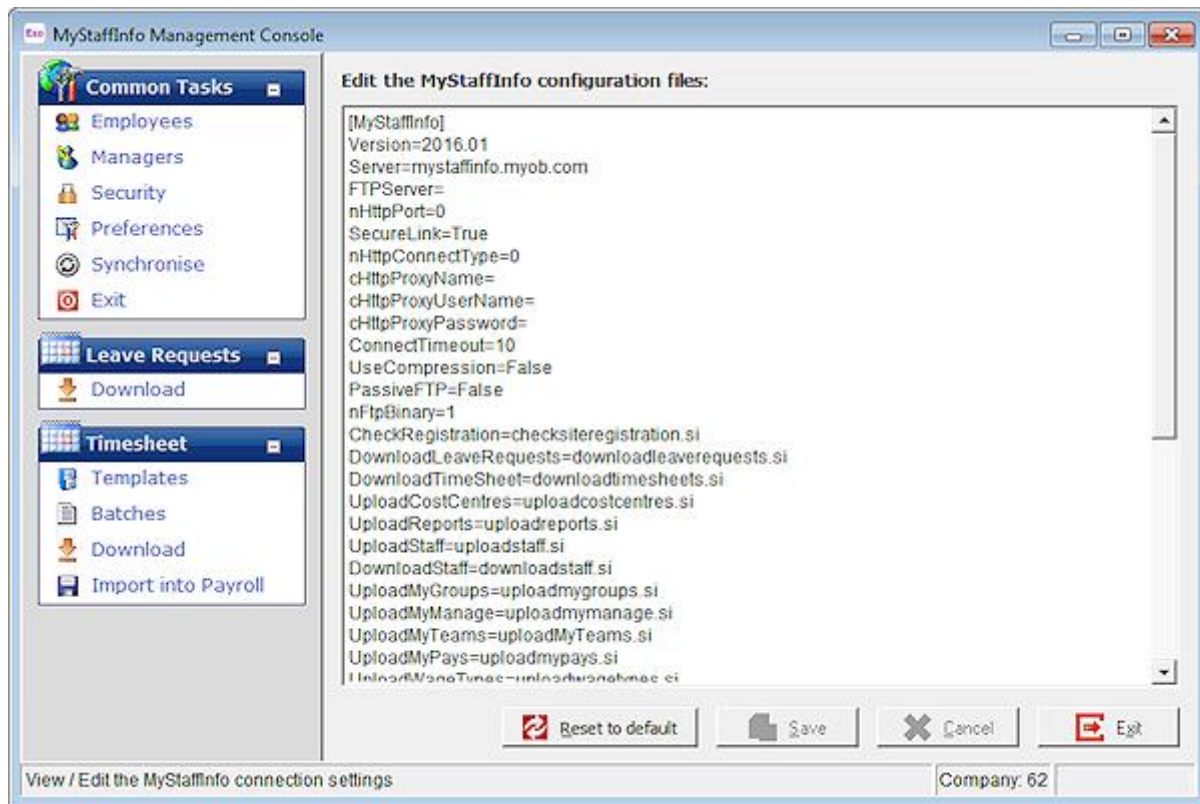
User Name Here you can provide the user name of an Administrator user who has access rights to the Administrator functions pertaining to all of your payroll companies' information on the website. This person does not necessarily have to be an employee or user of your Exo Payroll system. This is useful when there are multiple companies established in Exo Payroll, and one person is required to administer all companies in MyStaffInfo.

Password Enter the unique password, which must be entered with the email address, to complete the administrator website login.

View/Edit the MyStaffInfo connection settings

Common Tasks > Preferences > View/Edit the MyStaffInfo connection settings

From the Common Tasks pane, click the Preferences link. "View/Edit the MyStaffInfo connection settings" is the third task on the list.



NOTE: These settings should **only** be altered under the direct guidance of the Helpdesk.

Proxy Servers

The Proxy settings in the MyStaffInfo connection settings allow connection via a proxy server; to use MyStaffInfo with a proxy server, configure the settings as follows:

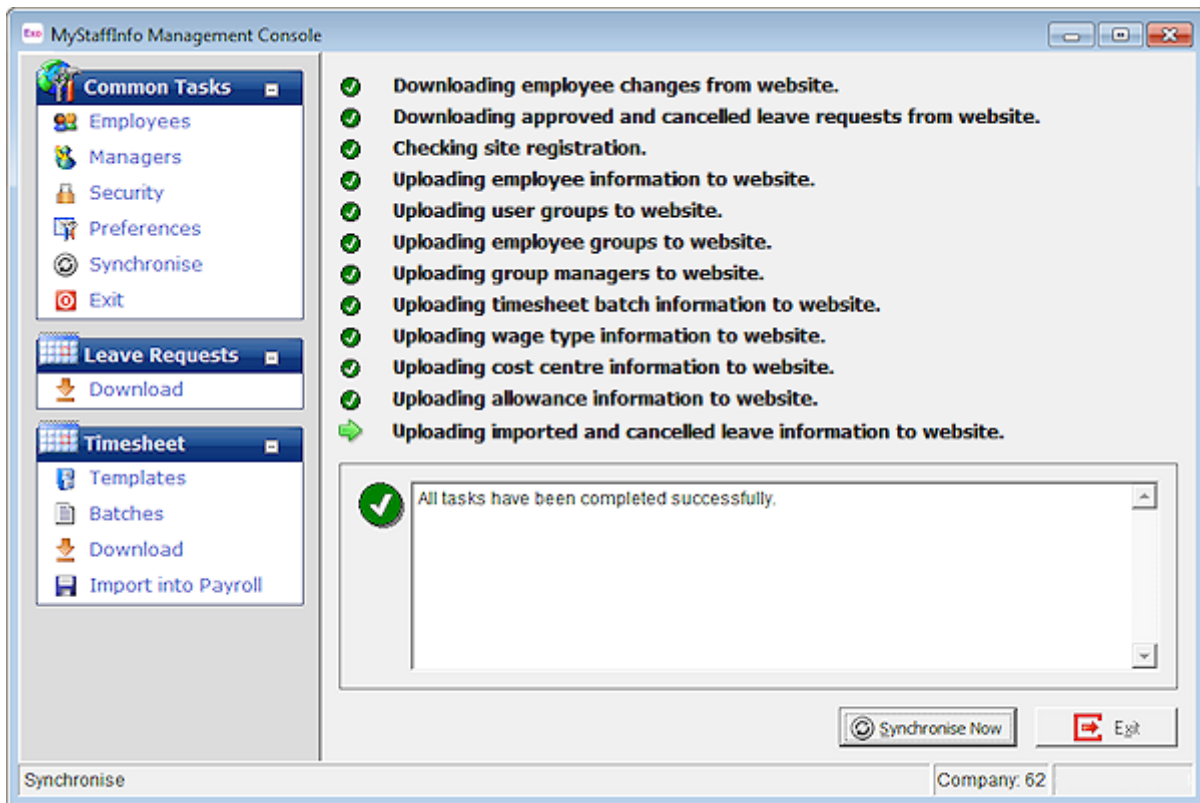
- nHttpConnectType – change to 3 (the default is 0).
- cHttpProxyName – enter the domain name or IP address of the proxy server, including the port in use, e.g. servername:8080.
- cHttpProxyUserName – enter the username used to log in to the proxy server.
- cHttpProxyPassword – enter the password used to log in to the proxy server.

Synchronise

Common Tasks > Synchronise

After making changes to any settings in the Management Console, such as selecting, deselecting or editing an employee, your data will have changed. This will require synchronisation between Head Office and your website.

From the Common Tasks pane, select the Synchronise task. The Synchronise screen appears. Click **Synchronise Now** to download changes made on the website and upload any changes you have made at in the Management Console.



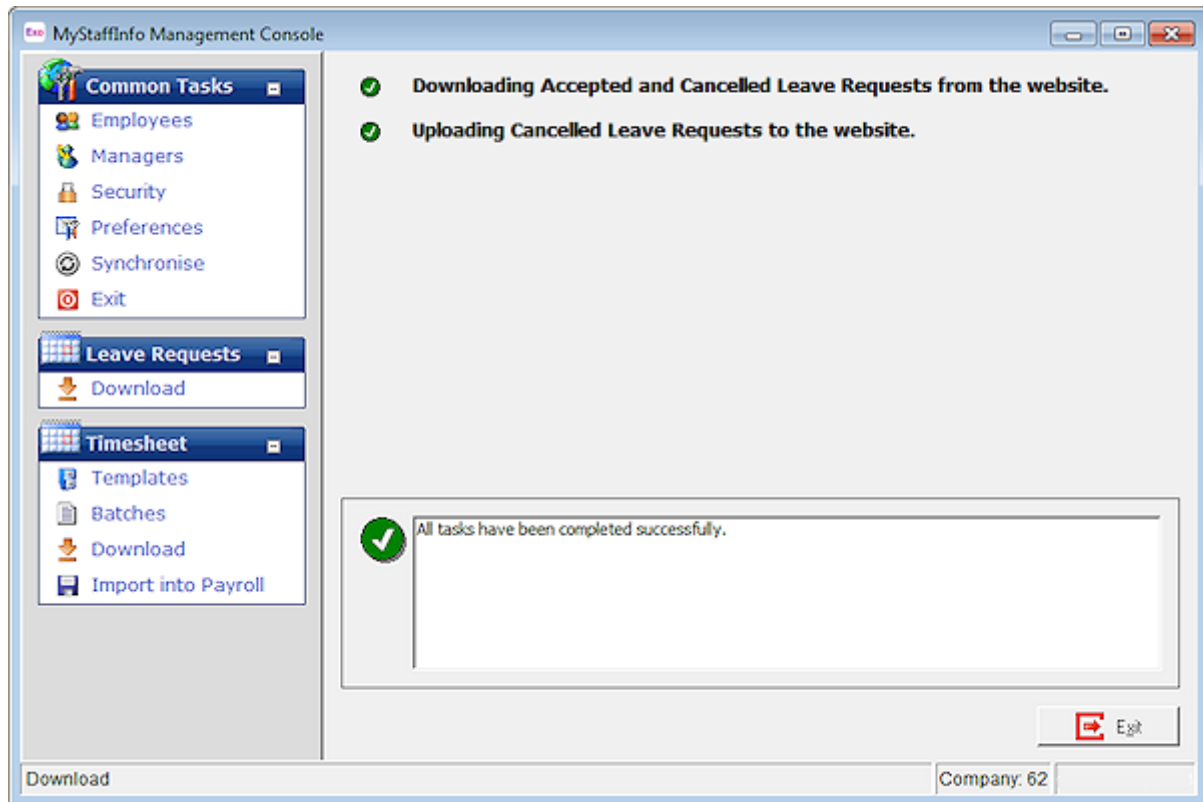
NOTE: If you are importing timesheet times from MyStaffInfo into Exo Time and Attendance, you must always poll MyStaffInfo from Time and Attendance before performing any synchronisation operations from the MyStaffInfo Management Console.

Leave Requests

Download Leave Request

Leave Requests > Download

If there is a [+] next to Leave Requests, click on the Leave Requests group to reveal the links underneath it. The Download link is the first on the Leave Requests pane, and is where you download all approved leave requests from the website in preparation for import into the Current Pay.

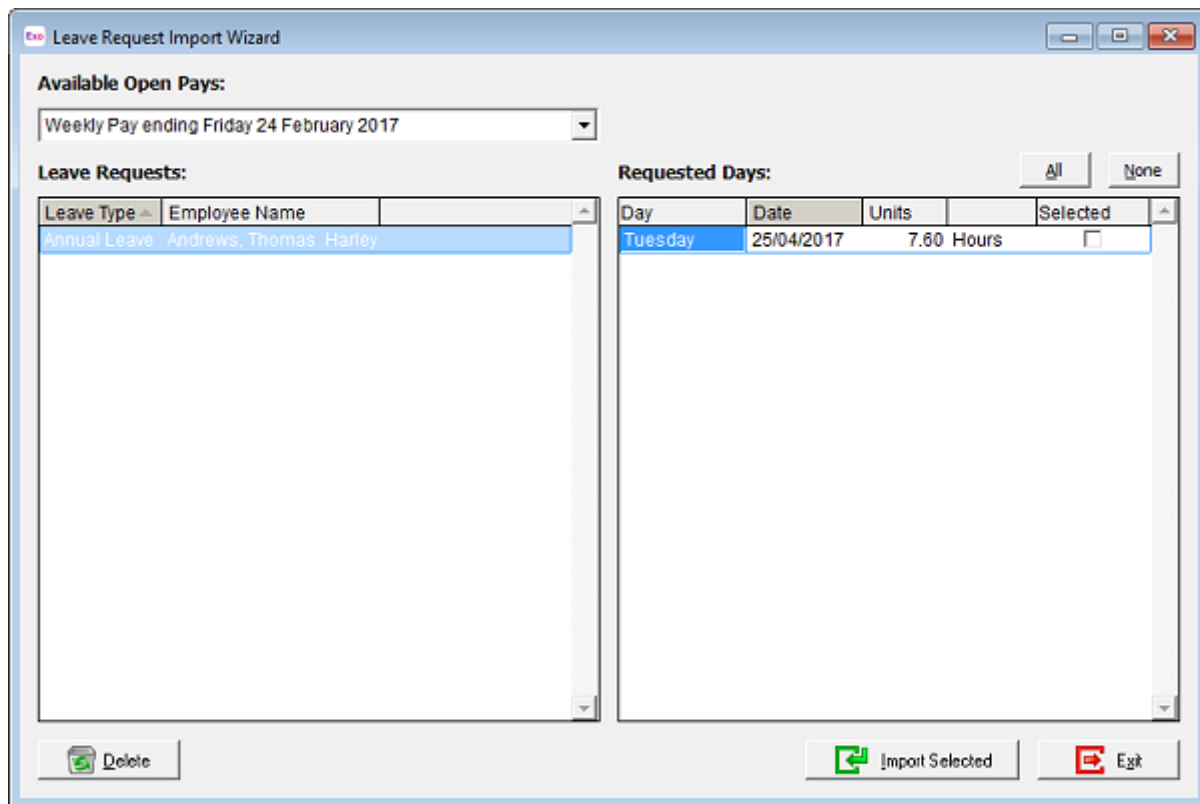


Click on the **Download** link to initiate the download process.

New Requests

Leave Requests > New Requests

The New Requests task is where you can see the new leave requests which have been downloaded from the website, and are awaiting import into the Current Pay.



Available Open Pays

The Current Pay has to be open, in order for leave to be imported into it. Generally, this screen will load with the correct Open Pay period already selected. The exception to this is if you run concurrent Current pays with different pay frequencies. If that is the case, you will need to strictly follow the correct sequence of events. For example, if you pay weekly waged employees and monthly salaried employees, you will need to select the appropriate frequency, perform the import, then select the next applicable frequency, and perform the import for that Current Pay.

Leave Requests

A list of permanent and casual employees, who have a paid on matching pay frequency, as set in Payroll in their Open Employee screen, and who have approved leave requests that are awaiting import, will appear in the left hand window. You can navigate to each employee by clicking on the appropriate grid line or by using the up and down arrow keys.

Requested Days

Each day for which there is a related leave request will appear in the right hand window. Click on each line in the grid at left, in order to see that employee's requested days in the right hand window. Note that when the row that is highlighted at left changes, the window at right will refresh to display the days for the newly selected employee.

Selected

Days which fall within the currently selected pay period will automatically be ticked by the system. This is sufficient behaviour for most payroll operations.

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Days which fall before the currently selected pay period will automatically be unticked by the system. Take care when ticking such days - look at the prior pay periods' Pay Sheets, and determine what you did actually pay the employee for that day - you will want to avoid paying the same employee for the same day twice.

Days which fall after the currently selected pay period will automatically be unticked by the system. Take care when ticking such days, especially in a vacation situation. An employee may elect to take a vacation that involves several weeks of leave. During the time that he or she is away, the employee may express a desire to have all the leave paid at once, to cover for travel expenses. You may elect to tick such days, but it is advisable that you make reminder notes for any days of unpaid leave, plus what the employee should be paid in the forthcoming absent weeks, plus what the employee should be paid on the first week back.

You will also need to ensure that should a public holiday pay fall on a day that would otherwise be a working day, that the employee is paid public holiday leave and not holiday pay for that day, and that the total paid holiday is extended by a day. Any days which fall into the next pay period and not the current pay period, will be automatically ticked when the Open Current Pay is updated and the next Current Pay is created.

Click the **All** button to confirm all Approved and Downloaded leave for import into the Current Pay. You may want to arrow down through all of the employees individually, acknowledging the days at right, and then click on the All button, rather than selecting all of the days for all of the employees individually.

Click **None** to clear all selections.

Click **Import Selected** to import the selected leave transactions into the current pay - the results can be tracked on the Leave Paid report.

Clicking **Exit** returns you to the Management Console.

Timesheet

Timesheets > Timesheet [+] (only if the timesheet panel is minimised)

MYOB MyStaffInfo supports full timesheet functionality, and allows any employee with a login to key their own timesheets over the Internet. In addition, managers can enter timesheets for their subordinates over the Internet.

Templates and Batches are created and named at the management console.

After a synchronise operation, the templates appear on the website, so that values may be keyed for each day.

Default values representing the employees' roster are keyed into the template.

The pay period Batch is created at the management console, with Batch date serving as a cutoff point for the current pay period.

After a second synchronise operation, the pays appear on the website, so that alterations to the roster may be keyed for each day.

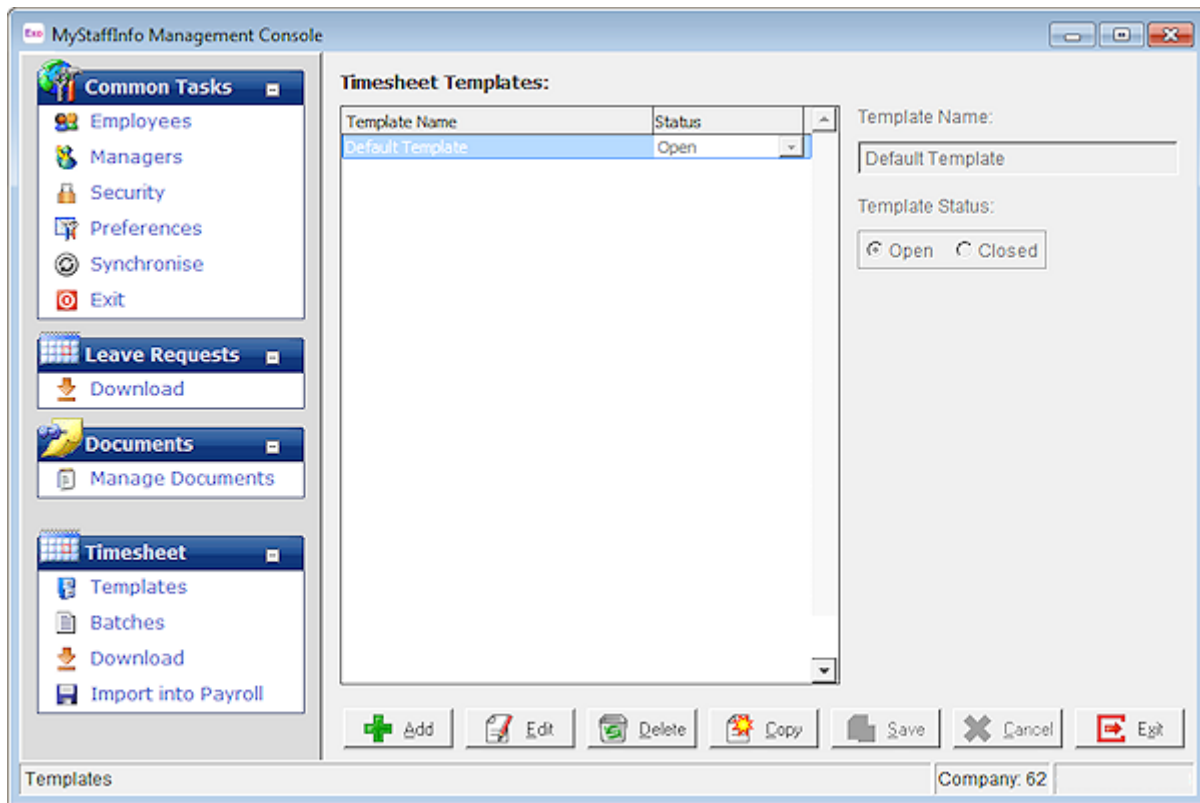
Timesheet entries contained in the pays are approved by the appropriate managers.

After a full pay period's complement of days has been reached, a scan is performed on the website, which extracts the units to pay for each transaction type and downloads them to an archive on the Payroll computer.

The transaction archive is then imported into Payroll's current pay period.

Templates

Timesheets > Template



The template is essentially the equivalent of the Standard Pay in Payroll. It contains the wages and the allowances that each MyStaffInfo employee is expected/contracted to receive (in payment for their regular pay period).

Templates can also be used for rostering purposes - you may elect to set up a template that represents a particular work pattern or reoccurrence of start and finish times. You may then apply the template to employee groups.

Click the **Add** button to create a new template or the **Edit** button to edit an existing one. The **Template Name** and **Template Status** fields become active.

Template Name Enter the name of the template, as it will appear in the template list in the timesheet on the website.

Status Only templates that have an "Open" status will be visible on the website. The status can be altered at any time. For example, you may have a template for Christmas Pays, for which the template status will remain "Closed" for most of the year. However, in December, the status can be changed to "Open" so that the work patterns contained therein can be applied to the last batch of the year.

Normally, at least one of your templates will have an "Open" status. Once you have completed your template setup, you may elect to perform a synchronise operation (see page 23). Any new open templates will immediately become visible on the website, meaning that you will be ready to create default transactions in the new template.

Copying Templates

Selecting an existing template and clicking the **Copy** button creates a new template with the same properties as the selected one. Copied templates are named "Copy of <original template name>" by default - this name can be edited by clicking the **Edit** button.

When a synchronise operation (see page 23) is performed, the copied template is uploaded to the MyStaffInfo website, and is populated with all of the entries that have been set up for the template it was copied from. After the initial synchronisation, the copied template can be edited on the MyStaffInfo website as normal - it will not be affected by any subsequent changes to the template it was originally copied from.

Setting up MyStaffInfo for Templates

There a number of configuration options available to set up the system for timesheets and templates. Exactly how the system should be set up depends on the requirements of the organisation and the processes you have in place around timesheets.

Access to the template functions is controlled by the following user security settings (see page 20):

- **Manage Group Templates (Manager)** – allows a manager to use the Templates page on the MyStaffInfo website to edit all available templates.
- **Manage My Template** – allows a manager or employee to use the Templates page to edit their own "My Template" template.
- **Apply Group Templates (Manager)** – allows a manager to apply a template to one or more employees' timesheets on the Enter Time page.
- **Apply My Template** – allows a manager or employee to apply their "My Template" template to their own timesheet on the Enter Time page.

The appropriate settings for these options depends on the process you want to use for templates. Example scenarios are discussed below.

Scenario 1 - Manager is responsible for all timesheets

In this scenario, a manager is responsible for all timesheet entry. The manager goes to the Templates page to set up templates containing the expected hours for each group of employees, and uses them to speed up data entry when entering employees' times on the Enter Times page. Employees do not have access to the Timesheets pages of the MyStaffInfo website.

To enable this scenario, the following user security settings should be enabled (ticked) for the manager(s) responsible for entering timesheets:

- Manage Group Templates (Manager)
- Apply Group Templates (Manager)

This gives the manager(s) access to the Timesheets page, and allows them to apply the templates on the Enter Times page.

All security settings in the **MyStaffInfo Timesheets** category should be disabled for all employees, so that they do not have access to any of the Timesheets pages.

Scenario 2 - Employees enter their own times

In this scenario, a manager sets up templates containing the expected hours for all employees. Employees then use these templates when entering their own times.

For this scenario, the "**Manage Group Templates (Manager)**" should be enabled (ticked) for the manager(s) responsible for setting up templates. This gives the manager(s) access to the Timesheets page, where they can set up all templates.

To give employees access to the Enter Times page, enable the **View Timesheet** security setting, and any/all of the following settings as appropriate:

- View Summary
- View Timesheet Entry
- View Wages Entry
- View Leave Entry
- View Allowances Entry
- View Other Entry

The **Apply My Template** security setting should be enabled for all employees who will be entering their own times.

The **Apply Group Templates (Manager)** setting can also be enabled; this will mean that a manager can use the templates they have set up to enter times on an employee's behalf if necessary.

Scenario 3 - Employees enter their own times and templates

In this scenario, employees are fully empowered to enter their own timesheet information. Employees set up their own personal templates and apply them when entering times to speed up data entry.

To give employees access to the Templates page and their personal templates, the **Manage My Template** security setting should be enabled (ticked) for all employees.

To give employees access to the Enter Times page, enable the **View Timesheet** security setting, and any/all of the following settings as appropriate:

- View Summary
- View Timesheet Entry
- View Wages Entry
- View Leave Entry
- View Allowances Entry
- View Other Entry

To allow employees to apply their personal templates on the Enter Times page, enable the **Apply My Template** security setting for all employees.

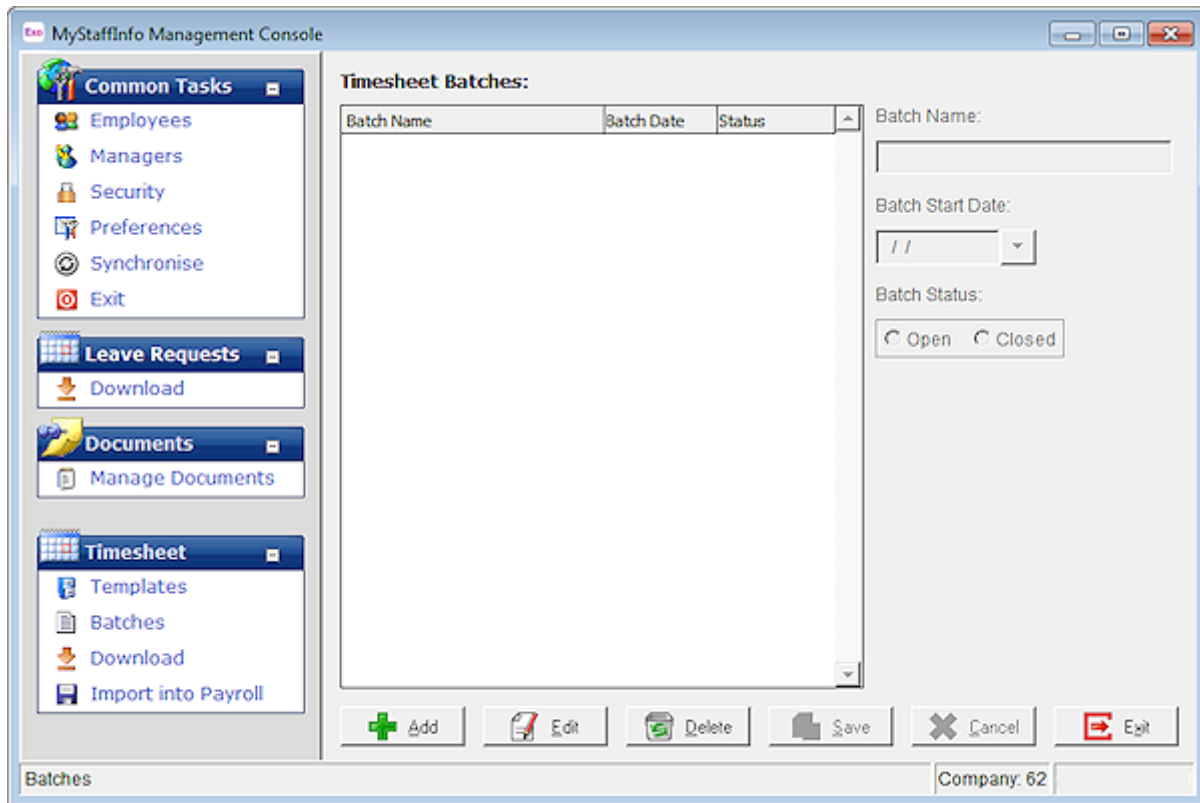
Note: If employees' times do not change very much from pay period to pay period, the **Apply My Previous Pay** option could also be enabled, to give users another method of quickly entering times.

The **Manage Group Templates (Manager)** and **Apply Group Templates (Manager)** settings can also be enabled for managers, to allow a manager to enter times on an employee's behalf. The manager will have access to each employee's personal template, which they can use to enter times for each employee.

Batches

Timesheets > Batches

From the Timesheet pane, select the Batches task. The Timesheet Batches tasks appear.



In order to run the pay, an empty "live" batch is created. Users at the website need only to make alterations to the batch when the "live" pay period contains a payment that differs from the normal payroll activity.

For example, were there to be a day of paid or unpaid leave in a weekly pay period, the alteration would be decrease the 40 waged hours to 32, and increase the leave hours to 8.

Click the **Add** button to proceed; the fields on the right become active.

Batch Name Enter a name for the batch.

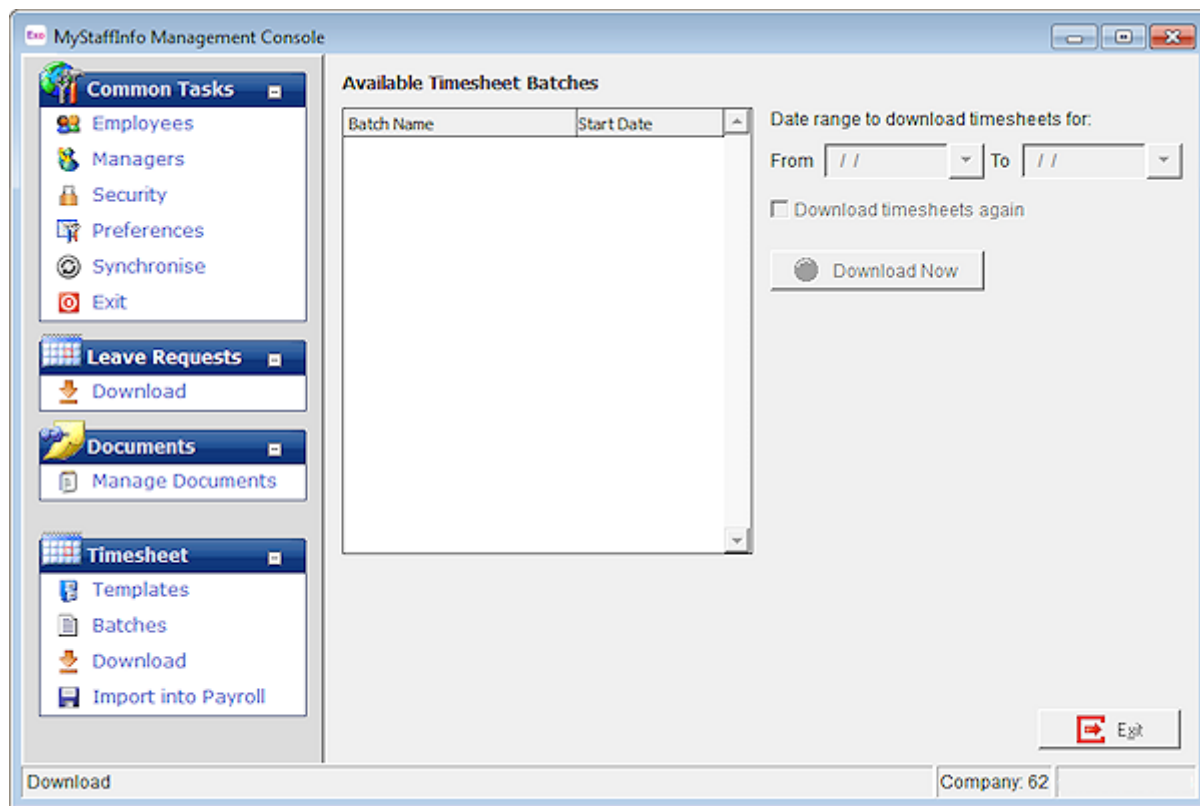
Batch Start Date It is advisable to begin each pay period by creating a new batch. Specify the start date of the new batch. By attaching dates to batches you will be able to differentiate between past batches and present ones.

Batch Status Only batches that have an Open status will be visible on the website. The status can be altered at any time. When a batch is closed, no batch entries can be added, edited, approved, or declined – the batch is essentially "locked down" with the next obvious operation being to download the transactions from the website. It is advisable to make all users aware of the deadline for changes to the timesheet data – once the batch is closed they will no longer be able to see the batch on the website to alter it.

Download

Timesheets > Download

From the Timesheet pane, select the Download task. The Timesheet tasks appear.



Available Timesheet Batches

Once the timesheet transactions have been entered at the website (either by the employee or their manager), and have been approved (by their manager), the transactions will be ready for retrieval and collation into a time transaction import file. The list of available batches will appear at left.

Date range to download timesheets for Once a batch is selected, the transactions in that batch may be partially or wholly downloaded. For example, if you want to download and import twice weekly, and the batch start date for the weekly batch is Wednesday 16 May 2009, and today is Saturday 19 May, you could elect to download and import for the dates of 16/05/2009 to 18/05/2009. When Wednesday 23 May arrives, you could then elect to download and import for the rest of the pay period, i.e. 19/05/2009 to 22/05/2009.

Specifying dates to download means that you are setting distinct cut-off points for the beginning and the end of the pay period. For example, if today is Friday 18 May 2009, and your pay week ends on a Thursday, specifying a To date of 17/05/2009 ensures that no transactions for the morning of Friday 18 May will end up in the Current Pay.

Type in the appropriate date range, from 1 day after your last pay period end date to the pay period end date of your currently open pay. For a weekly pay, you will be looking at a date span of 7 days, for a fortnightly pay, you will be looking at a date span of 14 days, and so forth.

Timesheet data may span across various dates and may belong to various pay frequencies. Here you will need to be selective about which dates' weekly transactions belong in your currently open weekly pay period, also which dates' fortnightly transactions belong in your currently open fortnightly pay period, and so forth.

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You may want to simply download all of the transactions in the batch. If so, do not enter **From** or **To** dates; just click the **Download Now** button to retrieve all transactions from the currently selected batch.

Download timesheets again In preparation for the Import into Payroll (see page 33), you need to have a full pay period's allocation of transactions. If you have previously downloaded for the currently selected batch, and that download does not contain a full pay period of data, you have the ability to re-download transactions from for the batch. A re-download will overwrite any prior downloads for the batch.

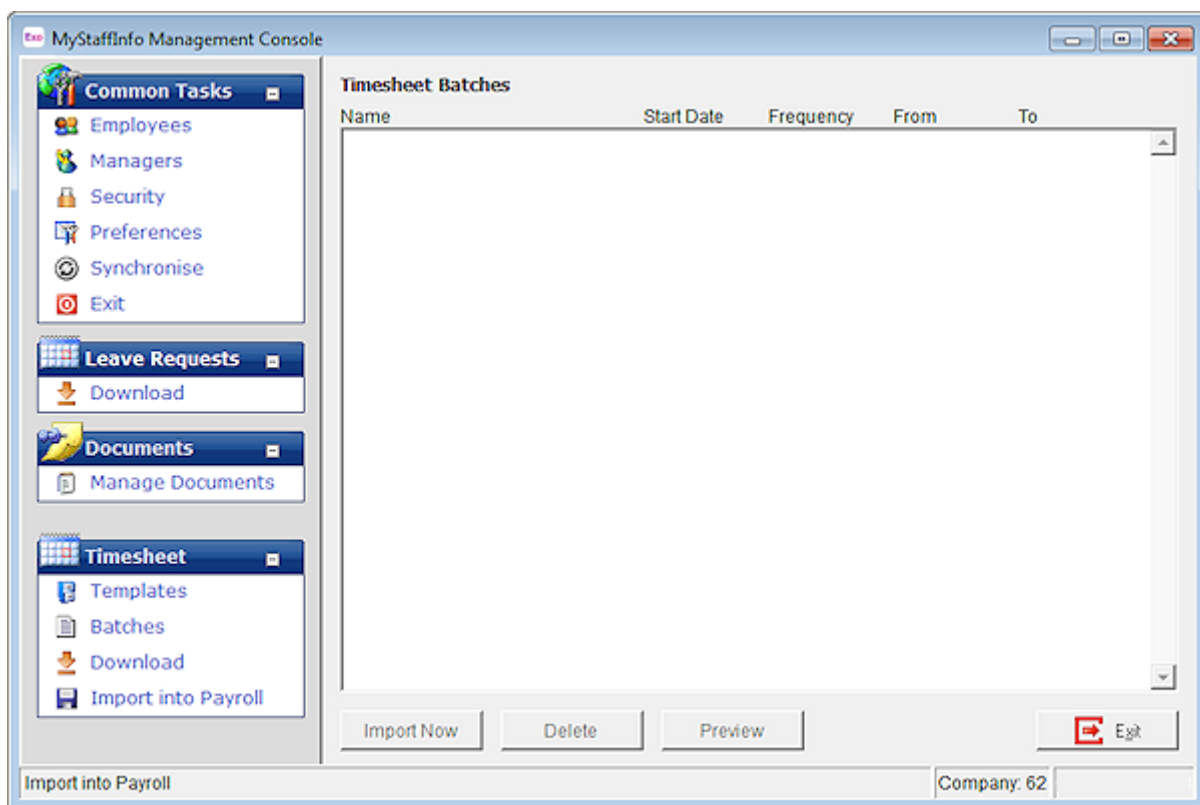
Download Now

Highlight the appropriate batch (usually the most recently dated batch in the list) and click the **Download Now** button to retrieve transactions from the website and collate the data into a time transaction file.

Import into Payroll

Timesheets > Import into Payroll

From the Timesheets pane, select the Import into Payroll task.



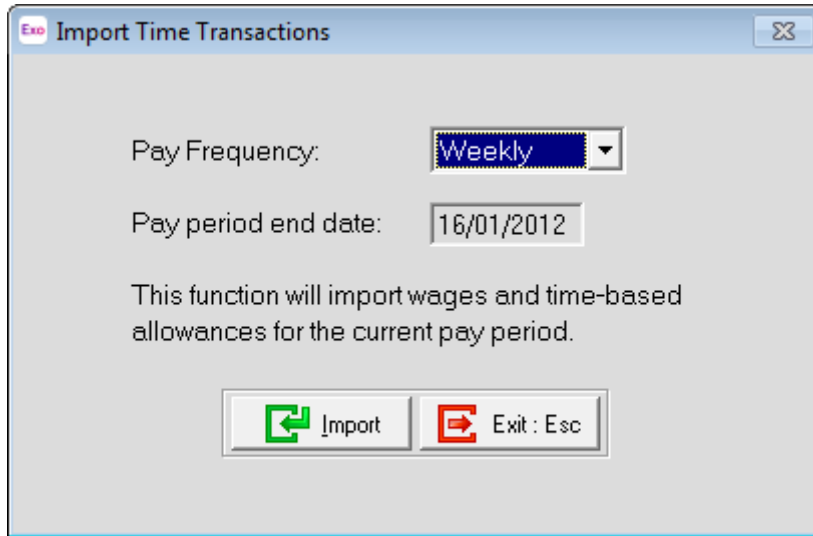
This function imports the time transaction file into MYOB Exo Payroll.

Timesheet Batches

A list of recently downloaded Batches will be displayed here. Click the appropriate batch (usually the Batch with the most recent date), then click the **Import Now** button to proceed.

Import Now

Ensure that the Current pay period frequency and dates have been specified correctly, and that the Current Pay Period is open.



Exo Import Time Transactions

Pay Frequency: Weekly

Pay period end date: 16/01/2012

This function will import wages and time-based allowances for the current pay period.

Import Exit : Esc

From the Import Time Transactions screen, click the **Import** button to proceed; you will be prompted to make a backup, after which the new transactions will be imported into the Current Pay.

NOTE: If you also use the Import Time Transactions functionality in MYOB Exo Payroll, a window may appear asking you to select a file to import; if this happens, select **timetran.dbf** and click **Next** to continue.

Delete

If the archived website data for a certain timesheet is no longer required, highlight the appropriate timesheet archive and click the **Delete** button to remove the archive.

Website

Website Features

Before you get started with setting up your website, we suggest that you take the time to familiarise yourself with the general structure and philosophy of the system. To access MyStaffInfo, as with any Internet site, you need to have a currently open Internet connection, along with an Internet browser program, such as Microsoft's Internet Explorer or Mozilla's Firefox.

The Internet address is <https://mystaffinfo.myob.com>; click on this link or type it into the address field in your browser.

Website Sections

The MyStaffInfo website is divided into the following sections:

- Home (see page 37)
- Leave Management (see page 42)
- Employee Messaging (see page 51)
- Payslips (see page 55) & Reports (see page 56)
- Timesheets (see page 58)
- Administration (see page 75)

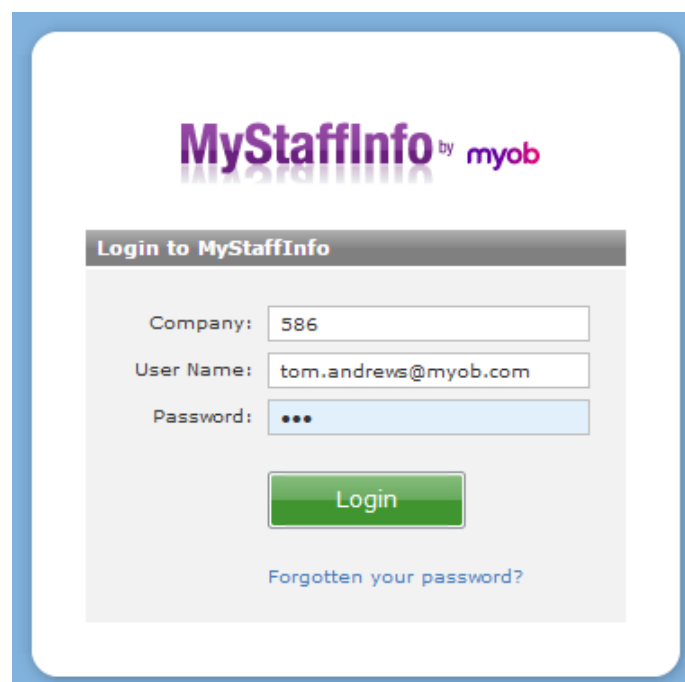
Each section is further divided up into tabs. The security settings (see page 19) configured for each employee determine which sections and tabs are available to them.

Login

Your login details are required to access the key functions of MYOB MyStaffInfo.

Logging in to MyStaffInfo

You will need to obtain the login correct details from your website administrator or Payroll clerk to log in to the secure website.



MyStaffInfo by myob

Login to MyStaffInfo

Company:

User Name:

Password:

[Forgotten your password?](#)

Company

Enter your company number, as provided to you by MYOB upon purchase of your software. This will be a combination of your Licence number and your payroll company number.

User Name

Enter your user name here.

- For payroll employees, this value is derived from the Email address field of the payroll's Open Employee screen.
- For payroll users, this value is derived from the Email address field of the payroll's User Security screen.
- For website administrators, this value is derived from the Email address field of the website administrator account, as stored in the Preferences section of the management console.

Password

Enter the matching password for the person whose login detail was entered in the previous field. Click the login button to continue.

Changing your Password

We recommend that your user password be changed regularly. You can do this once you have logged in by clicking the **Change Password** link at the top right of the screen. This takes you to the Change Password screen:

Current Password

Before you can change your password, you must be able to re-enter the password that you logged in with. This is so that no-one else can change your password should the computer be left unattended.

New Password

Enter your new password, provided that the password meets the requirements listed on-screen.

Confirm New Password

Confirm your new password, in case you mis-keyed it the first time.

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Click the **Save** button to permanently change your password. Note that any of your old payslip reports that may be held on the website will not reflect this change. Old payslips will be encoded with your old password, and any new payslips (pending a synchronise operation) will be encoded with your new password.

Logging Out

Once you are logged in to the system, a **Log Out** button is available at the top right of the screen:



The **Log Out** button securely exits you from the website - be sure to use the **Log Out** button after each data entry session, so that other users cannot use your open session or your cached web pages to view your personal information.

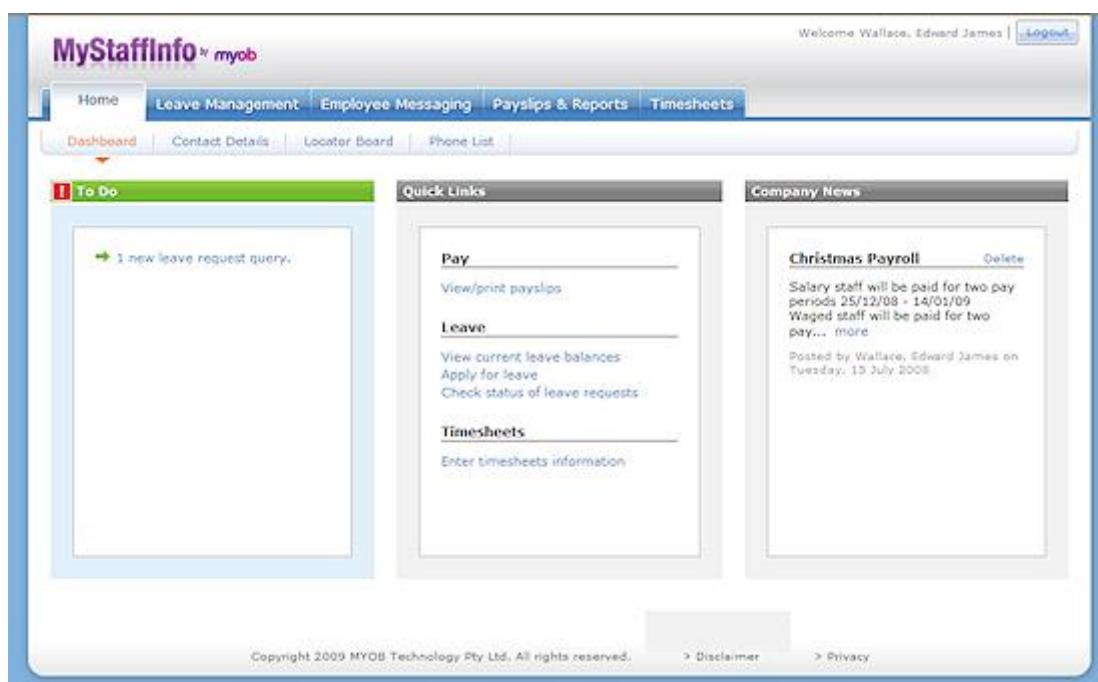
Home

When you log in, your Internet browser will default to the Home section. The associated page tabs for this section are:

- Dashboard (see page 37) - A Welcome page displaying important messages and quick links to other pages.
- Contact Details (see page 38) - Displays employee's details, including personal and contact details.
- Locator Board (see page 40) - Displays the current status/location of all employees.
- Phone List (see page 41) - Displays the phone numbers and email addresses of all employees.

Dashboard

This is the default page tab for the Home section, and also for the website, once you have logged in. This is essentially a Welcome screen providing a central list of incoming messages that would normally be scattered around the website. You will automatically see links to any new messages received since your last session.



This screen contains the following sections:

- The **To Do** section contains links to any messages waiting for you. These messages can be new unread messages, new unread news items or new unprocessed leave requests.
- The **Quick Links** section contains links to commonly used MyStaffInfo pages.
- The **Company News** section displays any company-wide news messages that have been sent.

NOTE: If there are no messages to display in a section, that section does not appear.

Contact Details

This tab displays data from your MYOB Exo Payroll software. The information is for employee identification, such as contact telephone numbers, e-mail and address details. Tax code information is read-only.

Field Definitions

The form fields are detailed in the table below:

Field	Description
Group	<p>The group (see page 14) selector will only be visible for employees who are also marked as Managers (see page 10). The default group is named <My Details>. This particular group is not a true employee group - it is merely a placeholder for managers to access their own timesheets without having to first select the employee group to which they themselves belong.</p> <p>In the situation of the Manager being responsible for more than one employee group, it is important that the correct group is selected from the list box, so that in turn, the appropriate set of employees in that group are accessible to match transactions against. Take care to ensure that each group is activated in succession – if you miss the selection of a group, you will also have missed out all of the employees belonging to that group.</p>

Employee	This is the full name of the currently highlighted member of staff, and indicates to the Manager that the timesheet being reviewed is for one of their subordinates.
General Information	This is employee-specific information that can be read on MyStaffInfo. This information cannot be altered in MyStaffInfo and must be changed in MYOB Exo Payroll.
Surname	This employee's last name.
First Names	The employee's first and middle names.
Alpha Code	This is the alpha code from Exo Payroll.
Birth Date	The employee's date of birth.
Tax Information	This is employee-specific income tax information that can be viewed from the MyStaffInfo website. This information cannot be altered in MyStaffInfo and must be changed in MYOB Exo Payroll.
Pay Frequency	This indicates how often the employee is paid, and therefore taxed.
TFN Number	The employee's unique Tax File Number as provided by the Australian Taxation Office for PAYE tracking purposes.
Tax Scale	This is the employee's tax rate from Exo Payroll.
Start Date	The date at which this employee commenced their current term of employment with the company.
Personal Information	This information can be maintained and updated via the website.
Payslip Name	When printing a payslip, MYOB Exo Payroll will print the employee's surname, followed by the employee's first name(s). If you wish a different name to appear on the payslip, enter this here. It is recommended to incorporate a surname.
Address	Enter the street name and number, pertaining to the employee's residential address.
Suburb	Enter the employee's suburb of residence.
City	Enter the employee's city or town of residence.
Post Code	Enter the postal code, pertaining to the employee's residential address.
Telephone	Enter the employee's contact telephone number.
Mobile	This is the number of the employee's cellular telephone, i.e. mobile phone.
Email	This is the employee's email address. This is also the employee's primary login to the MyStaffInfo website.
Banking Information	The employee bank account number is entered and updated here for salary purposes.
Account Number	Enter the bank account number here in the format specified. This is the bank account number where their pay will be deposited / transferred.

User-Defined Information	These are extra pieces of information that can be recorded against an employee.
Logical	This is a Logical field, meaning that ticked = True, unticked = False.
Text	This is a character field, meaning that it stores a string of text.

Updating Information

If you make a change in the Contact Details screen, click the **Update** button in the relevant section to update the MyStaffInfo Head Office and Exo Payroll records permanently.

Locator Board

This tab will show the user the specific whereabouts of an employee. This is useful if that employee needs to be contacted quickly as the best method of contact will be listed here. The contents of the locator board can also be printed out, as a standard operating procedure in the case of an evacuation.

In other words, the Locator Board serves as a quick reference for finding out whether employees are:

- On the work premises
- Absent from the work premises
- At lunch
- On leave

MyStaffInfo by myob

Welcome Wallace, Edward James | | Logout

Home | Leave Management | Employee Messaging | Payslips & Reports | Timesheets

Dashboard | Contact Details | **Locator Board** | Phone List

Your Location

Name	Status	Due Back	Notes
Wallace, Edward James	In <input type="checkbox"/>	23/04/2009 13:30	<input type="text"/>

Colleague Locations

Name	Status	Due Back	Notes
Andrews, Thomas Harley	In	- not set -	
George, Thomas Russell	In	- not set -	
Giles, Harrison Relf	In	- not set -	
Hillary, Matthew Martin	In	- not set -	
Houghton, Jannet Faye	In	- not set -	
Jackson, William Duncan	In	- not set -	
Karuso, Robinson Henry	In	- not set -	
Keating, Karl Adrian	In	- not set -	
Smith, Sandra Olive	In	- not set -	
Tate, Bernard Cedric	In	- not set -	
Watson, Judy May	In	- not set -	

Group The group selector will only be visible for employees who are also marked as Managers. The default group is named <My Details>. This particular group is not a true employee group - it is merely a place holder for managers to access their own locator status without having to first select the employee group to which they themselves belong.

Employee The employee selector and navigational arrows will only be visible for employees who are also marked as Managers. This is the full name of the currently highlighted member of staff, and indicates to the Managers that the locator status being reviewed is for one of their subordinates.

Name Each name is a hyperlink that, when clicked, takes you to the Send Messages screen (see page 52). The **Send To** box will be pre-populated with this person's name.

Status: This is the employee's last allocated status. To alter the current status, select one of the following:

- In
- Out
- Lunch
- Holiday
- Sick

NOTE: The list of status options is customisable, so it may not contain all of the options listed above.

Due Back If the employee is on leave or out, you can optionally set a future date and/or time when the employee is due back. This will automatically be changed back to "In" status on their return.

NOTE: The Due Back fields are only available for certain status options.

Notes Here you can add extra comments relating to the employee's current attendance status.

Once you have made your changes, click the **Save Changes** button. Your new status will be visible to all other MyStaffInfo employees.

Printing a Status Report

Click the **Print** button to display a standard print dialog, which will allow you to print out a location status report.

Phone List

The Phone List tab serves as a quick reference for identifying and contacting staff via telephone or email should they be unable to check the Inbox at MyStaffInfo.

Name	External Email	Phone	Mobile
Andrews, Thomas Harley	2	303-6987	
George, Thomas Russell		236-9874	
Giles, Harrison Relf		123-6987	
Hillary, Matthew Martin		3266987	
Houghton, Jannet Faye	3	236-9687	
Jackson, William Duncan		236-9875	
Karuso, Robinson Henry		123-4567	
Keating, Karl Adrian		236-6987	
Smith, Sandra Olive	4	369-9874	
Tate, Bernard Cedric		123-6987	
Wallace, Edward James	1	236-6987	
Watson, Judy May		123-9687	

Form field definitions

The details of this web page form are detailed in the table below:

Field	Description
Group	<p>The group (see page 14) selector will only be visible for employees who are also marked as Managers (see page 10). The default group is named <My Details>. This particular group is not a true employee group - it is merely a placeholder for managers to access their own timesheets without having to first select the employee group to which they themselves belong.</p> <p>In the situation of the Manager being responsible for more than one employee group, it is important that the correct group is selected from the list box, so that in turn, the appropriate set of employees in that group are accessible to match transactions against. Take care to ensure that each group is activated in succession – if you miss the selection of a group, you will also have missed out all of the employees belonging to that group.</p>
Details	
Name	The employee's full name will be displayed here.
External Mail	The employee's public Internet email address will be displayed here. Click the link to open your Internet email program. By using Internet email you have the added advantage of being able to send file attachments.
Phone	The employee's contact telephone number will be displayed here if desired. This is security-controlled for privacy. By default, phone numbers will be masked, unless the employee has marked as being allowed to view them, in the Head Office User Security screen.
Mobile	The employee's cellular telephone number will be displayed here.

Printing the Phone List

Click the **Print** button to display a standard print dialog, which will allow you to print the phone list to the printer of your choice.

Leave Management

This tab provides mechanisms for making your own leave requests, and provided that you have "Manager" status, processing other employee's leave requests.

The associated page tabs for this section are:

- Leave Balances (see page 43) - A reference to the current balance of leave available for each leave type.
- Leave Calendar (see page 43) - A read-only summary of the leave requests for all types of leave.
- Make Leave Request (see page 44) - Allows you to request a period of leave, and then forward the request for approval to the manager.
- My Leave Requests (see page 47) - Concerns requests that you have made to your manager.
- Manage Leave Requests (see page 48) - A utility for managers where leave requests can be approved, subject to considerations such as eligibility, entitlement dates, and the current balance of leave. Leave requests can also be declined or deleted.

Leave Balances

This tab provides a reference to the current balance of leave available for each leave type. In other words, to determine if the employee has enough leave entitlement to cover the period they will be away from work.

The horizontal row of buttons running from left to right provide access to the current balance for each of the basic leave types:

The screenshot shows the MyStaffInfo interface for user Edward James. The 'Leave Management' tab is active, and the 'Leave Balances' sub-tab is selected. The interface displays the following data for each leave type:

Leave Type	Entitlements	Balances
Long Service Leave	Entitlement Hours: 173.33	Prior to 16/08/1978: 3.33 Between 16/08/1978 and 17/08/1993: 3.33 After 17/08/1993: 218.78 Year-To-Date: 89.33 Balance: -454
Personal Leave	Entitlement Hours: 80 Max. Hours Entitlement: 0	Carry Over: 58 Year-To-Date: 46.15 Balance: 104.15
Annual Leave	Entitlement Hours: 160	Carry Over: 115 Year-To-Date: 92.31 Balance: 207.31
Rostered Day Off		Remaining Hours: 0
Lieu Hours		Remaining Hours: 1

Annual, Personal, Long Service, Lieu Hours, Rostered Day Off

These are the default leave types from Exo Payroll. Clicking on each link will display the balance and entitlement dates (where appropriate). All values are read-only.

Leave Calendar

This tab provides a read-only summary of the leave requests for all types of leave. From here, Manager can see across the entire group, who will be working on a given day, and who has been or will be absent. For example, the foreseen absence of one staff member may be taken into account, if a second staff member applies for leave on that same day.

The screenshot shows the MyStaffInfo interface for Wallace, Edward James. The 'Leave Calendar' tab is active, displaying a calendar for April 2009. The calendar grid shows days 1 through 30. The employee's name is listed as Wallace, Edward James. The calendar shows several days with colored indicators: 20th, 21st, 22nd, 23rd, and 24th are marked with orange squares, indicating pending leave requests. The legend below the calendar defines the colors and codes for various leave types:

- Approved** (Green square)
- Declined** (Red square)
- Pending** (Orange square)
- AL** Annual Leave
- SL** Sick Leave
- LS** Long Service Leave
- BL** Bereavement Leave
- PH** Public Holiday
- AA** Alternative Leave Accrued
- AP** Alternative Leave Paid
- UN** Unpaid Leave
- SH** Shift Leave
- OT** Other Leave

Group

Employees who are marked as Managers will be able to access the leave calendar for the employee groups to which they are assigned. This value will default to the Manager's default employee group. If you do not see the correct employee, ensure in the first instance that the correct group has been selected from the list box. Alternatively, you can select <My Details> from the list, in order to review your own personal calendar.

Show Select an option to filter the list of leave requests. Choose from:

- **All Requests** - Show all requests. This is the default.
- **Approved Requests** - Show only leave requests which have been approved by the manager of the employee group.
- **Pending Requests** - Show only leave requests which are awaiting an Approve/Decline response from the manager.
- **Declined Requests** - Show only leave requests which the manager refused to have actioned.

Make Leave Request

This tab allows you to request a period of leave, and then forward the request for approval to the manager who is responsible for the employee group to which you belong. Leave requests are split into a two step process:

Step 1: Select Leave Type and Days

Field definitions

The request leave web page form fields are detailed in the table below:

Field	Description
Group	<p>The group (see page 14) selector will only be visible for employees who are also marked as Managers (see page 10). The default group is named <My Details>. This particular group is not a true employee group - it is merely a placeholder for managers to access their own timesheets without having to first select the employee group to which they themselves belong.</p> <p>In the situation of the Manager being responsible for more than one employee group, it is important that the correct group is selected from the list box, so that in turn, the appropriate set of employees in that group are accessible to match transactions against. Take care to ensure that each group is activated in succession – if you miss the selection of a group, you will also have missed out all of the employees belonging to that group.</p>
Employee	<p>This is the full name of the currently highlighted member of staff, and indicates to the Manager that the timesheet being reviewed is for one of their subordinates.</p>
Details	
Type of Leave	<p>Select the type of leave being applied for, e.g. Annual Leave. Available leave types are taken from Exo Payroll.</p>

Send Request to	Select the manager that this request should be sent to.
Calendar	Tick the appropriate box for the calendar days on which the leave is being requested. Click the < and > buttons to navigate between months.
Comments	Enter any extra comments which may be relevant to the leave application, e.g. pay leave all in advance, spread leave over each pay period, etc.

Once all details are entered, click **Continue** to go to the next step.

Step 2: Enter Units

Each leave request, once approved, will be downloaded from the website via the management console, and converted into a payroll transaction. It is important that managers look not only at the fact that a day off has been requested, but also at the exact number of units to pay.

The screenshot shows the 'MyStaffInfo' website interface. At the top, there is a navigation bar with 'Home', 'Leave Management', 'Employee Messaging', 'Payslips & Reports', and 'Timesheets'. Below this is a sub-navigation bar with 'Leave Balances', 'Leave Calendar', 'Make Leave Request', 'My Leave Requests', and 'Manage Leave Requests'. The main content area is titled 'Step 1 - Select Leave Type and Days'. It includes a dropdown for 'Type of Leave' set to 'Annual Leave', a 'Send Request to' dropdown set to 'Wallace, Edward James', and a calendar for 'April 2009'. The calendar shows dates 23, 24, and 27 selected. To the right of the calendar is a 'Comments' text area. Below the calendar is an 'Update' button. The second section is 'Step 2 - Enter Units', which shows a table with columns for 'Day', 'Date', and 'Days'. The table contains two rows: 'Friday, 24 April 2009' with '1.00' units and 'Monday, 27 April 2009' with '1.00' units. A 'Submit' button is located at the bottom right of this section.

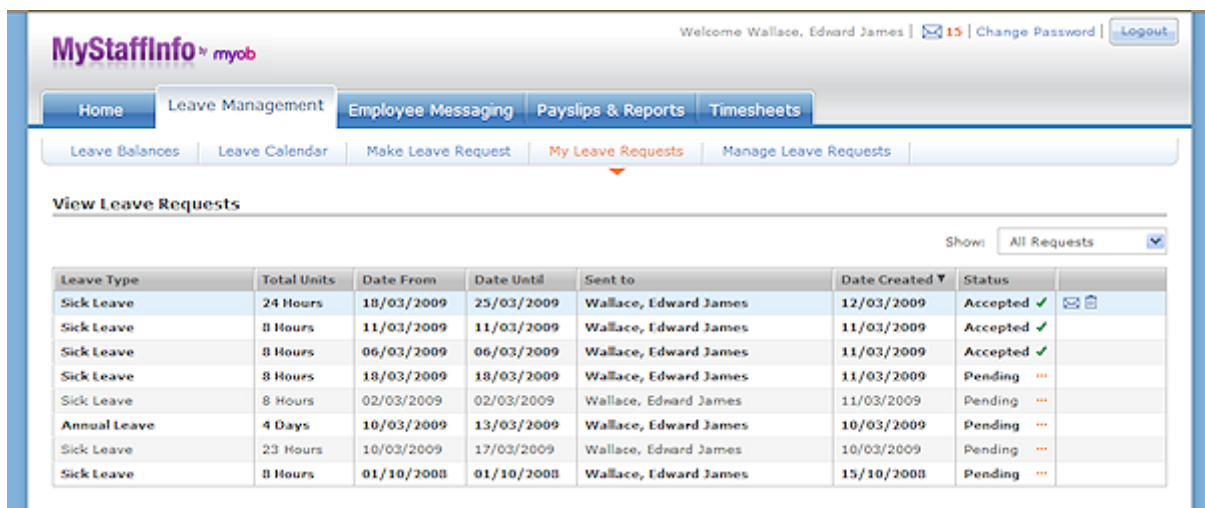
Field definitions

Field	Description
Dates Requested	Here you will see one row for each day that was selected in Step 1.
Days/Hours	<p>If the leave entitlement for the leave type in question is being measured in days, this value will default to one per day and would not normally need to be changed.</p> <p>If the leave entitlement for the leave type in question is being measured in hours, the second step involves entering the number of hours that need to be paid for each of the days of leave. The leave entitlement will be reduced by the same number of hours when the leave transaction is downloaded from the website and imported into the Current Pay.</p>

Click on the **Submit** button to continue. You are taken to the My Leave Requests (see page 47) screen, which now displays the new leave request.

My Leave Requests

The My Leave Requests tab concerns requests that you have made to your manager.






Request Filters

To manage leave requests more efficiently, you can apply a filter to simplify your processing requirements:

Filter	Description
All Requests	This is a list of all leave request items, regardless of leave approval status.
Approved Requests	This is a list of all leave request items that have been approved by the request recipient.
Declined Requests	This is a list of all leave request items that have been declined by the request recipient.
Pending Requests	This is a list of all unaltered leave request items created by the currently logged in user.

Unread Requests	This is a list of all updated leave requests that have not yet been viewed.
Downloaded Requests	This is a list of all leave request items that have been downloaded to the MyStaffInfo Management Console.
Imported Requests	This is a list of all leave request items that have been successfully imported into a pay in Exo Payroll.
Cancel Requested	This is a list of all leave request items that are pending cancellation.
Cancelled Leave Requests	This is a list of all leave request items that have been cancelled.

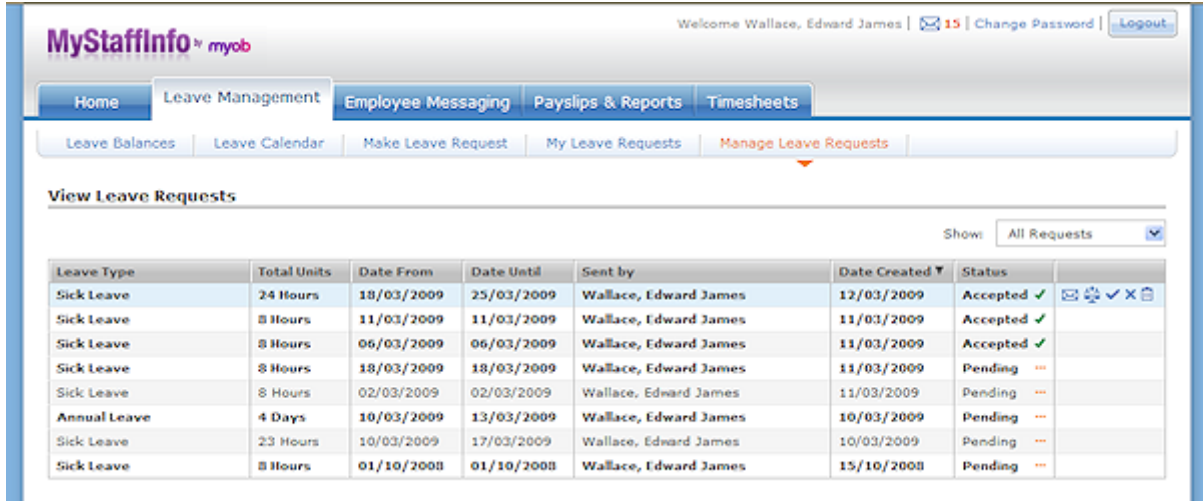
Simple View

Column	Description
Leave Type	The type of leave must be recorded - in many cases, the payment of leave subtracts from the current balance of leave, for the leave type in question.
Total Units	The total number of days or hours to be paid, usually 8 for a full day, or 4 for a half day if this is of the sick leave type. For annual leave this is simply listed in days.
Date From	The date from which the leave begins.
Date Until	The last date upon which there is paid leave.
Sent To	The recipient of your request will be displayed here.
Date Created	The date that the leave request was created.
Status	The leave request's current status: Pending, Approved, Declined, Downloaded, CancelReq, Cancelled or Imported.
Actions	Several icons appear next to the currently highlighted request.
	Click this icon to send a message about this leave request to your manager.
	Click this icon to delete the leave request. Only leave requests with the Approved, Pending or Declined status can be deleted.
	Click this icon to cancel the leave request. Only leave requests with the Downloaded status can be cancelled. The request changes to the CancelReq status - the cancellation will be processed the next time leave requests are downloaded to the MyStaffInfo Management Console (see page 25) or a Synchronise task is performed (see page 23), at which time the request's status will change to Cancelled.

Manage Leave Requests







The Manage Leave Requests tab will be displayed for users who have been accorded a "Manager" status. Leave requests can be approved, subject to considerations such as eligibility, entitlement dates, and the current balance of leave. Leave requests can also be declined or deleted.

If leave requests are awaiting your attention when you log in to the website, an icon (✉) appears at the top right.



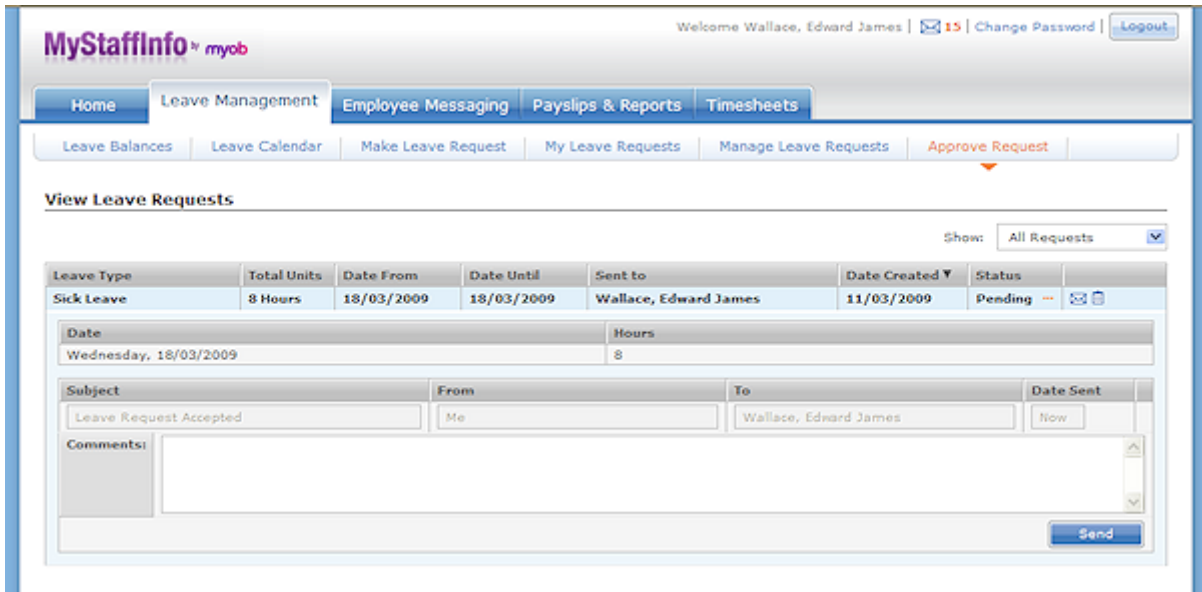
The layout of this page is very similar to that of the Inbox. Requests are segmented as follows:

Field	Description
All Requests	This is a list of all leave requests, regardless of approval status
Approved Requests	This is a list of all leave requests approved by the request recipient.
Declined Requests	This is a list of all leave requests declined by the request recipient.
Pending Requests	This is a list of all unaltered leave requests created by MyStaffInfo users that have the current user assigned as their manager.
Unread Requests	This is a list of all leave requests that have not yet been viewed.
Downloaded Requests	This is a list of all leave request items downloaded by the request recipient.
Imported Requests	This is a list of all leave request items that have been imported into the Current Pay in Exo Payroll.
Cancel Requested	This is a list of all leave request items that are pending cancellation. Requests will be cancelled the next time leave requests are downloaded to the MyStaffInfo Management Console (see page 25) or a Synchronise task is performed (see page 23).
Cancelled Leave Requests	This is a list of all leave request items that have been cancelled.

Table functions	
Leave Type	The type of leave must be recorded - in many cases, the payment of leave subtracts from the current balance of leave, for the leave type in question.
Total Units	The total number of days or hours to be paid, usually 8 for a full day, or 4 for a half day if this is of the sick leave type. For annual leave this is simply listed in days.
Date From	The date from which the leave begins.
Date Until	The last date upon which there is paid leave.
Sent By	The sender of your message will be displayed here.
Date Created	The date that the leave request was created.
Status	The leave request's current status: Pending, Approved, Declined, Downloaded, CancelReq, Cancelled or Imported.
Actions	Several icons appear next to the currently highlighted request.
	Click this icon to send a message about this leave request to the affected employee.
	View this employee's leave balances. This will appear in a pop-up window and is read-only. Generally, the request sender's leave balance is checked by the request recipient before a further decision is made.
	Approve this leave request. This will confirm a successful application for leave.
	Decline this leave request. You may choose to decline the leave request - this commonly occurs when there is a staffing issue, or the employee's current balance of leave is less than the days/hours being applied for.
	Delete this leave request. Only leave requests with the Approved, Pending or Declined status can be deleted.
	Click this icon to cancel the leave request. Only leave requests with the Downloaded status can be cancelled. The request changes to the CancelReq status - the cancellation will be processed the next time leave requests are downloaded to the MyStaffInfo Management Console (see page 25) or a Synchronise task is performed (see page 23), at which time the request's status will change to Cancelled.

Approving Leave

When a leave request is approved, you are required to send a message confirming your response. Optionally, you may elect to add a comment.



Click **Send** to send the message.

Employee Messaging

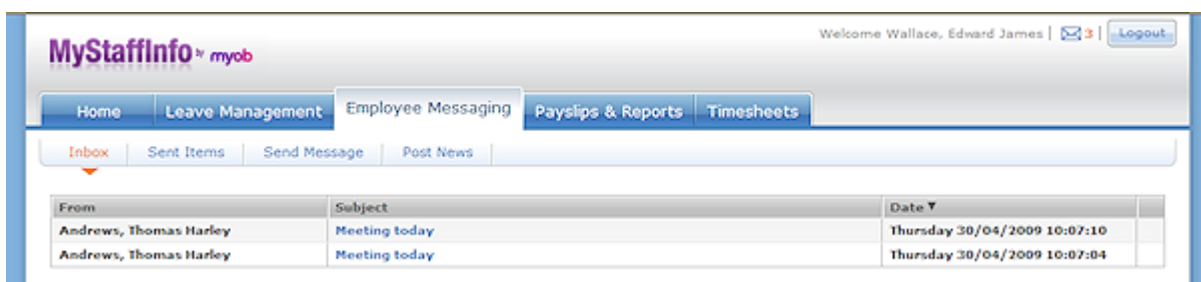
The Employee Messaging tab contains a fully-featured messaging system. Employees can exchange messages at any time. This can be useful in situations where employees do not have access to traditional forms of Internet email on their PC – such is the case where several employees share the use of the same machine.


The associated page tabs for this section are:

- Inbox (see page 51)
- Sent Items (see page 52)
- Send Message (see page 52)
- Post News (see page 53)

Inbox

The Inbox is your access point for incoming messages. Any subject lines for unread messages will appear in bold text. Subject lines for read items will appear in normal text. Click the appropriate message line to read the message in its entirety.



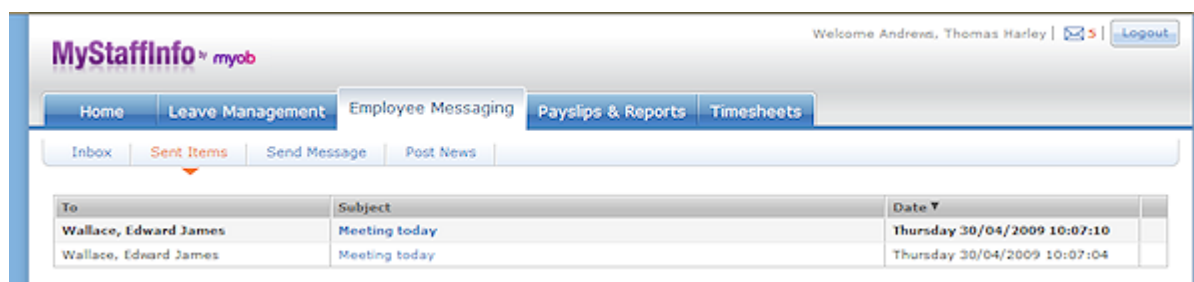
Function	Description
From	The sender of your message will be displayed here.
Subject	Meaning the headline of your message as described by the employee who sent it.
Date	The date and time at which your incoming mail was posted by the sender. You may elect to click the down arrow to reverse the sort order, e.g. oldest at top.
Actions	 - Click this icon to delete the message.

Sent Items


The Sent Items tab serves as an archive for the messages that you have sent historically. Click the appropriate message line to read the message in its entirety.

Your Sent Items list handles many types of messages, including:

- Messages sent to individuals
- News sent to all staff

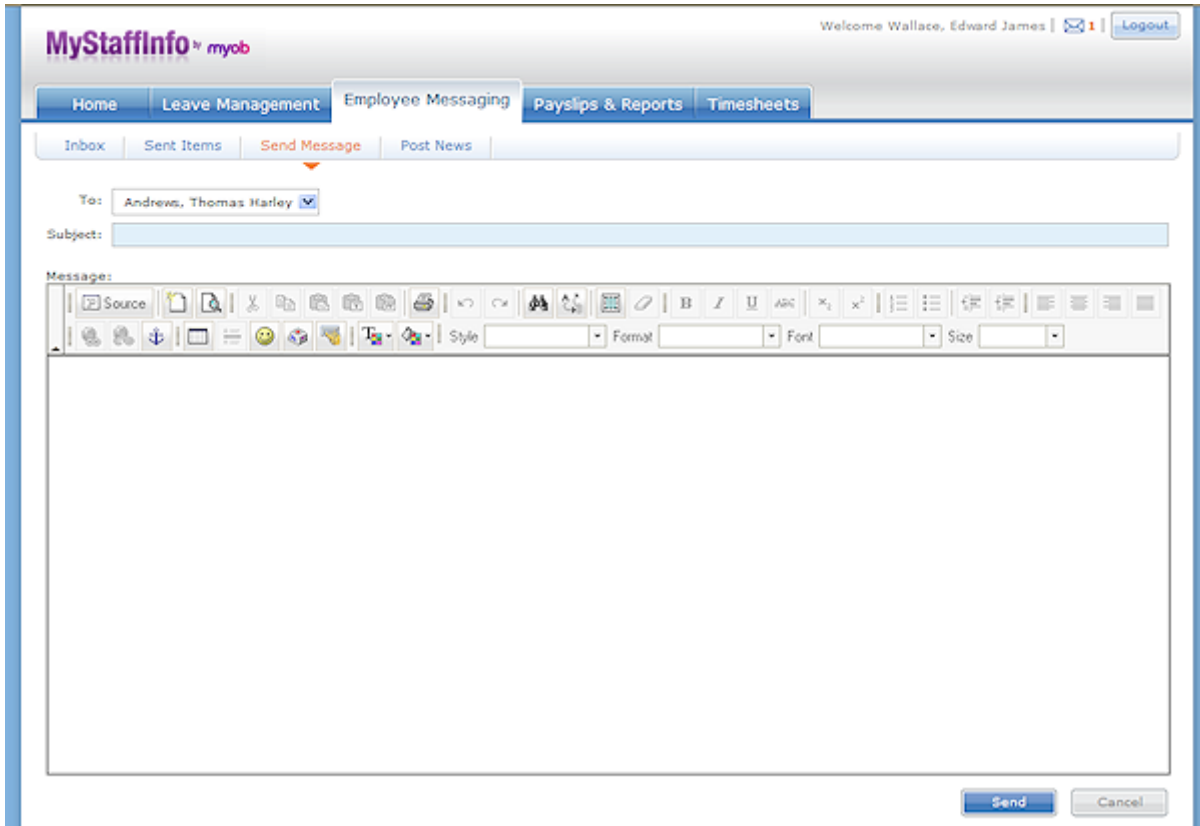


The layout of the Sent Items page is very similar to that of the Inbox (see page 51).

Field	Description
To	The recipient of your message will be displayed here.
Subject	Meaning the headline of your message.
Date	The date and time at which your outgoing was posted. You may elect to click the down arrow to reverse the sort order, e.g. oldest at top.
Actions	 - Click this icon to delete the message.

Send Message

To compose a new message and send it to another MyStaffInfo user, click the Send Message tab - the message editing page appears automatically.



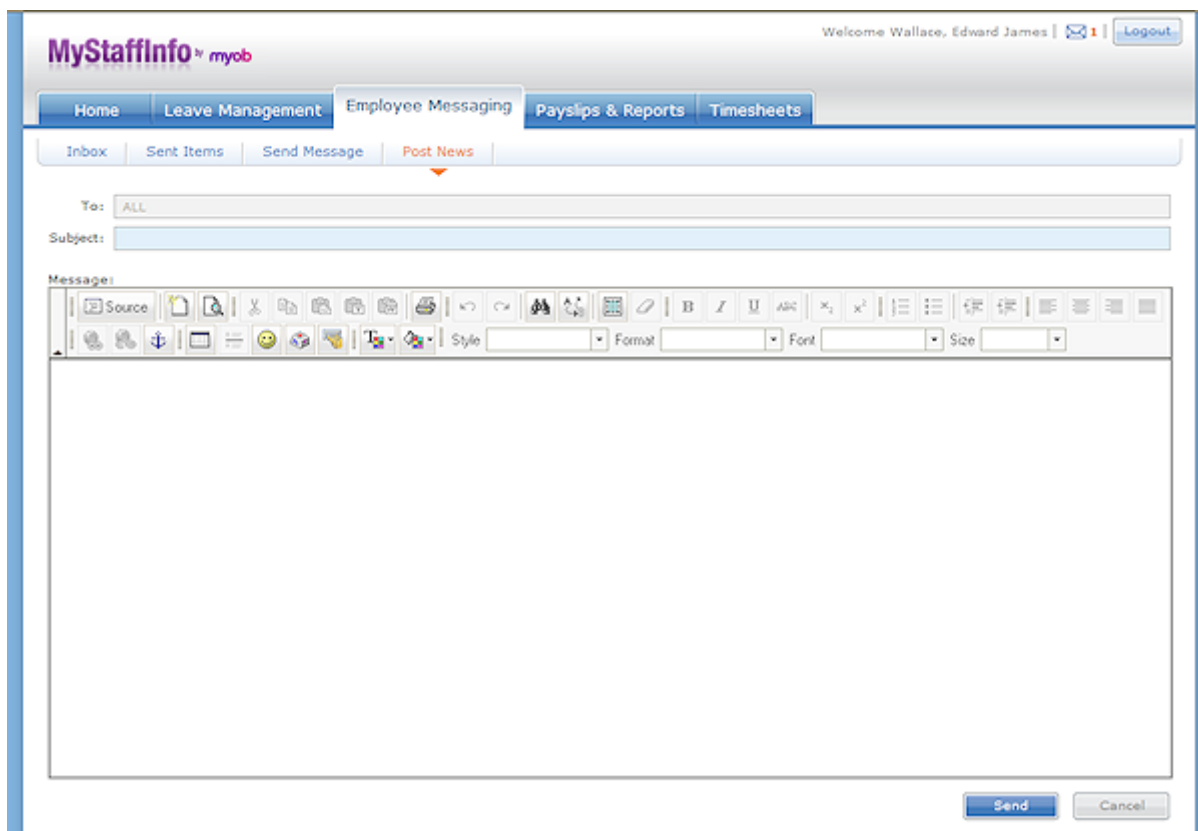
Function	Description
To	From the list box, select the person to be receiving the message.
Subject	Type a suitable heading, topic or summary here. Once you have typed your message, click the Send button to confirm – the message will be deposited in the employee's MyStaffInfo Inbox, and you will be redirected to the Inbox (see page 51), in readiness for the reply. It will also appear as a link on the recipient's Dashboard (see page 37) page.
Message	The message formatting tools are standard word processor based tools.

Once you have typed your message, click the **Send** button to transmit the message.

If you have typed a message and then decide that you want to discard the text, click the **Cancel** button to start again with a blank page.

Post News

This is where you would type a global news item, which will be seen by all other MyStaffInfo users, who belong to your payroll company. To compose a fresh news item, click **Post News**. The message editing page will appear automatically.



Function	Description
To	As this is a newscast to all employees, this value will default to "ALL", and cannot be changed. To send a message to an individual, use the Send Message (see page 52) function.
Subject	Type a suitable heading, topic or summary here.
Message	The message formatting tools are standard word processor based tools.

Once you have typed your message, click the **Send** button to confirm – the message will be sent to each employee's My Home page.

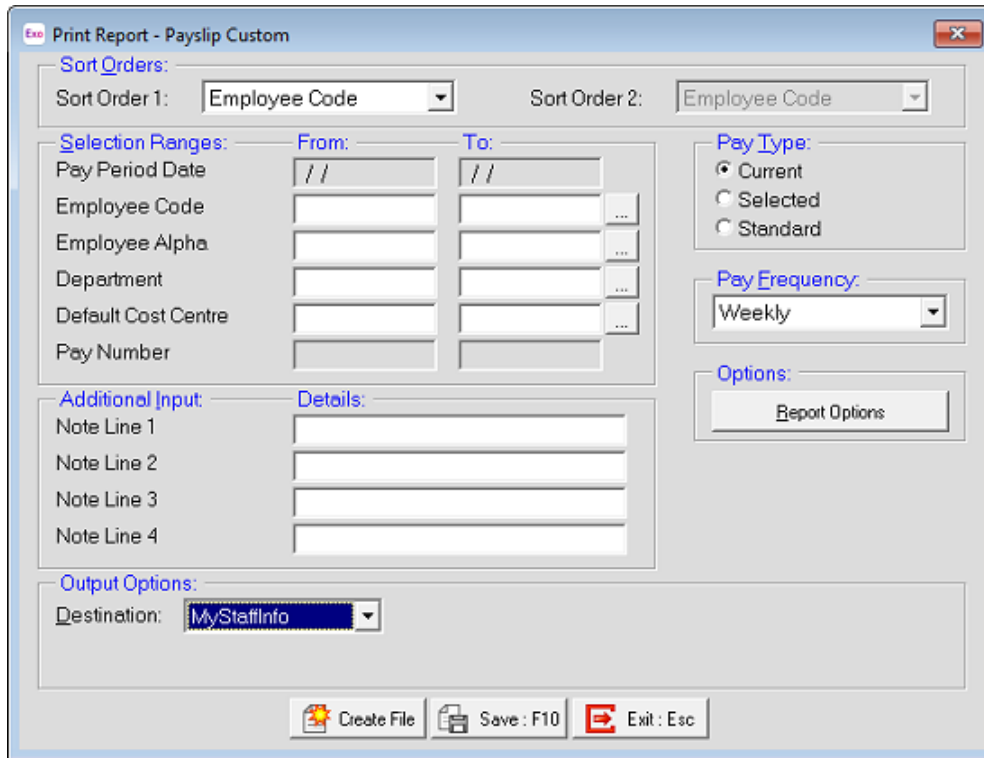
If you have typed a message and then decide that you want to discard the text, click the **Cancel** button to start again with a blank page.

Payslips & Reports

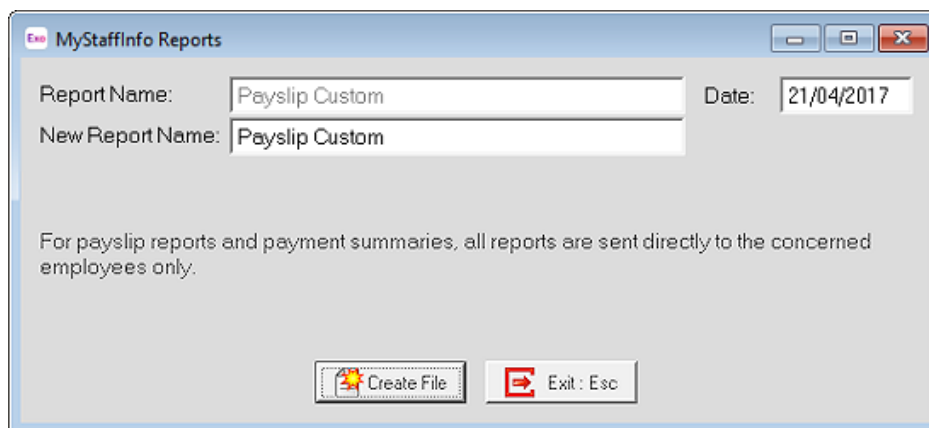
Payslips

Uploading Payslips

Payslips are generated from Exo Payroll's Print Report screen, after having specified a Destination of MyStaffInfo.



In the above example, the employees in this week's Current Pay will be able to view their payslip on MyStaffInfo. Click the **Create File** button to proceed - a confirmation screen will appear:

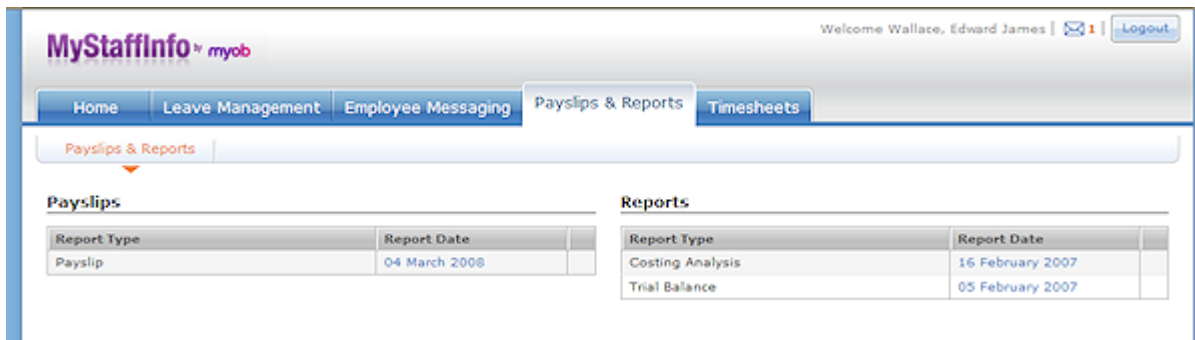


NOTE: If you choose to change the payslip report's name by changing the **New Report Name** field, the new name must contain the text "payslip". Payslips are treated differently from **other reports (see page 56)**, and MyStaffInfo identifies payslip reports by the presence of this text in the report name.

Click **Create File** again to upload payslips to the website. Once the operation is complete, a confirmation message will appear.

Viewing Payslips


From MyStaffInfo, you can view the payslips that have been distributed to each employee as PDF (Portable Document Format). From the website, click the Payslips tab.



Reports are listed in order of Pay Period End Date. Click on the link in the Report Date column for a payslip. Your PDF reader program will open and display the payslip. (If you do not have a PDF reader installed, you can download it from <http://www.adobe.com/products/acrobat/readstep2.html>.)

Payslips are password-protected, meaning that only the appropriate person can see the payslip. Enter the employee's password as stored in the Exo Payroll system, click **OK** and the PDF viewer will display the payslip.

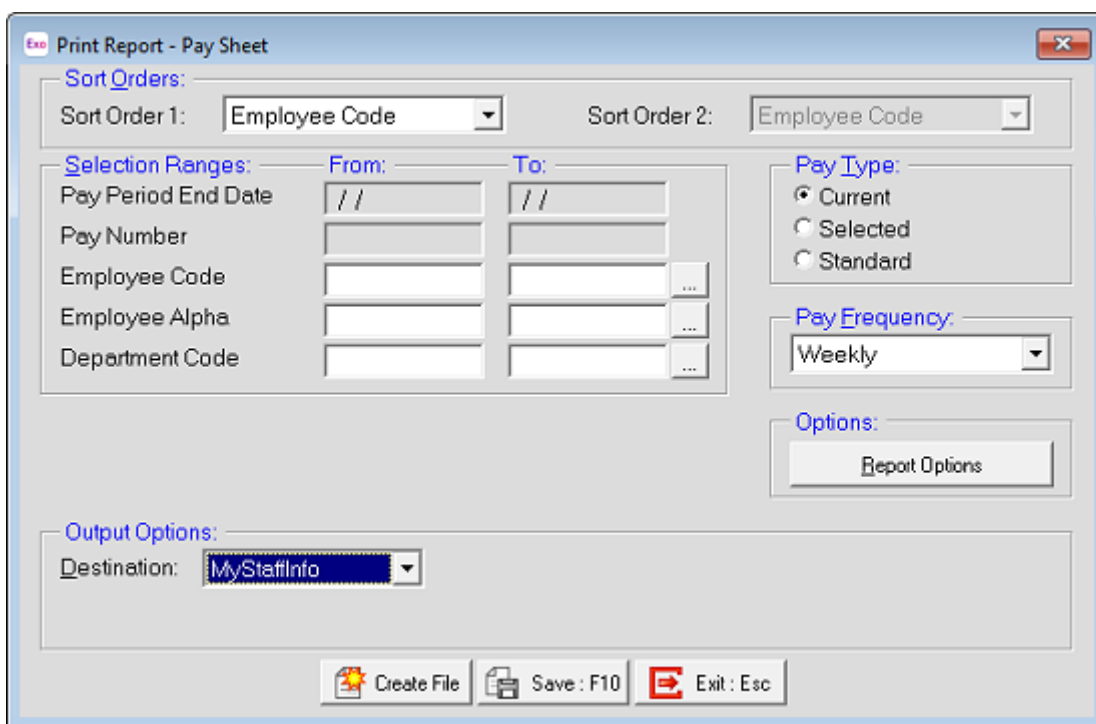
Deleting Payslips

Click the  icon next to a payslip to delete that payslip.

Reports

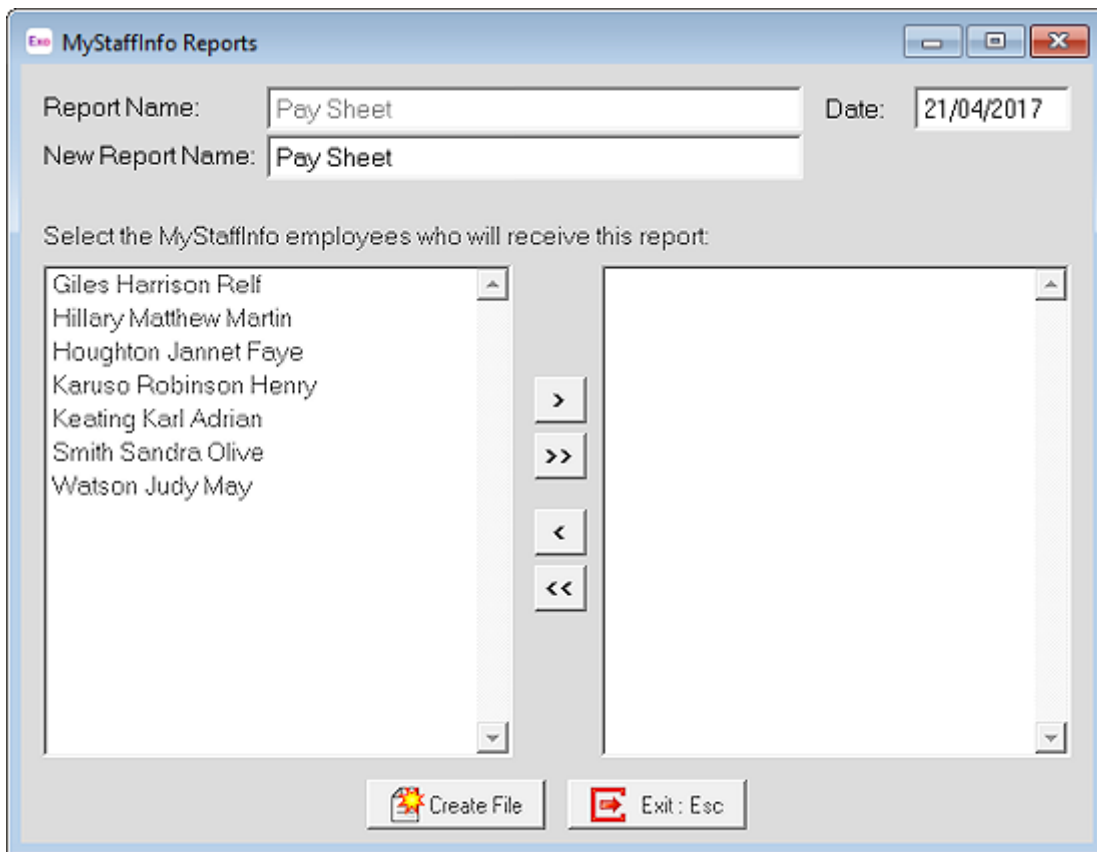
Uploading Reports

Payroll reports are generated from Exo Payroll's Print Report screen (for the report in question) after having specified a Destination of MyStaffInfo.



MYOB MyStaffInfo

Click the **Create File** button to proceed - a selection window opens, here you can specify a new name for the report, and choose which employees can see the report.



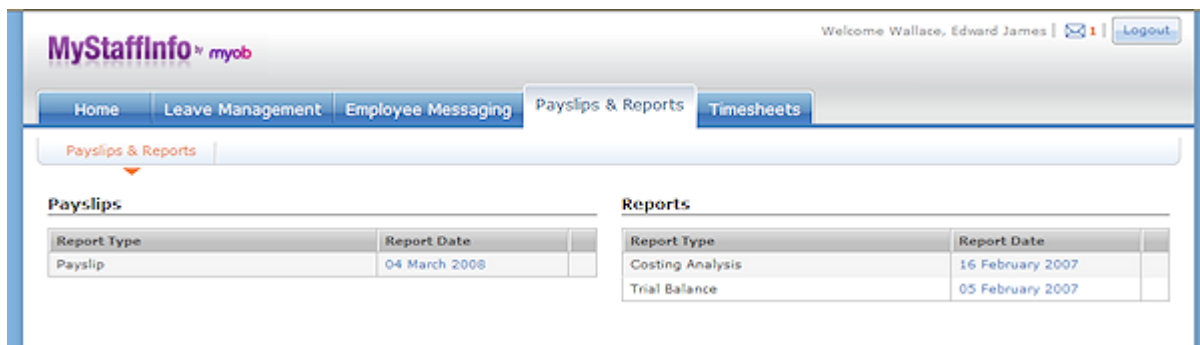
Take care when granting viewing privileges to company-wide reports; many of the reports in Exo Payroll are used for checking company totals. For example, the Pay Sheet report consists of one document containing all of the employee's data (unless a report filter has specifically been applied). Each selected employee receives the same document, containing all of the employees' pay data.

NOTE: Payslips (see page 55) are a special case - Payslip reports consist of one document containing an individual's pay data. Each employee receives a separate document, containing only their pay data. When uploading payslips, you cannot select individual employees to receive them.

Click **Create File** again to upload the report(s) to the website. Once the operation is complete, a confirmation message will appear.

Viewing Reports

From MyStaffInfo, you can view the reports that have been distributed to each employee. For example, the employees' pay sheets in PDF (Portable Document Format). Reports are listed in order of Pay Period End Date. From the website, click the Reports tab, to continue.



Click on the link in the Report Date column for a report. Your PDF reader program will open and display the report. (If you do not have a PDF reader installed, you can download it from <http://www.adobe.com/products/acrobat/readstep2.html>.)

Deleting Reports

Click the  icon next to a report to remove the report.

Timesheets

NOTE: The Timesheets function is an optional add-on to MyStaffInfo. If you require collation, approval and import of timesheets from the website to Exo Payroll, please consult the Helpdesk.

If at some point timesheets are enabled after the initial setup process, remember to review the Security Options in MyStaffInfo Head Office for each employee who will need access, and enable the new security items accordingly. After new Security Options have been enabled, you will need to perform a Synchronise (see page 23) so that the same changes can be effected on the website.

The associated page tabs for this section are:

- Group Summary (see page 60)
- Enter Time (see page 61)
- History (see page 68)
- Templates (see page 71)
- Report (see page 74)

Navigation Controls

The upper portion of the timesheet holds the Navigation Controls. No data is actually keyed here. The purpose of these controls to a get you looking at the correct records, for the correct employees and/or employee groups. In other words, any approving or declining is done in the context of the employee and/or group that you have navigated to.



The navigation controls are only accessible by Managers. This is to facilitate the review, alteration and approval of data other than the Manager's own personal data. Transactions must be approved by a Manager before they can be uploaded to Payroll.

Managers approve timesheets for employees who have been assigned to one or more employee groups, over which that Manager has jurisdiction. When the junior Manager is placed into an employee group, the senior Manager of that employee group will be responsible for approving the junior Manager's timesheet.

Employees who are not marked as Managers, and who have been granted access to the timesheet, may key in their own timesheets, but they cannot approve their own timesheets - this has to be done by their Manager.

Note that employees who are also marked as Managers may:

- navigate between employee groups
- navigate between the employees in those groups
- approve transactions for import into payroll.

Field Definitions

The form fields are detailed in the table below:

Field	Description
Pay	Transactions may be grouped into pays, and approved as a whole pay, or individually on a per employee basis.
Group	The group (see page 14) selector will only be visible for employees who are also marked as Managers (see page 10). The default group is named <My Details>. This particular group is not a true employee group - it is merely a placeholder for managers to access their own timesheets without having to first select the employee group to which they themselves belong. In the situation of the Manager being responsible for more than one employee group, it is important that the correct group is selected from the list box, so that in turn, the appropriate set of employees in that group are accessible to match transactions against. Take care to ensure that each group is activated in succession – if you miss the selection of a group, you will also have missed out all of the employees belonging to that group.

Employee This is the full name of the currently highlighted member of staff, and indicates to the Manager that the timesheet being reviewed is for one of their subordinates.

Starting This indicates the Batch Start date, of the currently selected Batch. This value is set in the Management Console, and cannot be altered on the website. Be sure to check that the Starting date is reflective of the start of the pay period that is about to be paid.

Approve Group

This option will only appear for Managers, and will approve all entries made for all of the employees in the currently selected employee group. This is effective for all transaction types. A confirmation message will be displayed before the entries are approved. Click the **OK** button to confirm.

Approve Emp

This option will only appear for Managers, and will approve all entries made for the currently selected employee. This is effective for all transaction types. A confirmation message will be displayed before the entries are approved. Click the **OK** button to confirm.

Decline Group

This option will only appear for Managers, and will decline all entries made for all of the employees in the currently selected security group. This is effective for all transaction types. A confirmation message will be displayed before the entries are declined. Click the **OK** button to confirm.

Decline Emp

This option will only appear for Managers, and will decline all entries made for the currently selected employee. This is effective for all transaction types. A confirmation message will be displayed before the entries are declined. Click the **OK** button to confirm.

Group Summary

Here you can review totals per transaction type, with one row for each employee in the group. You can view, edit, approve or decline transactions, in any sequence.

MyStaffInfo myob Welcome Andrews, Thomas Harley | 4 | Logout

Home Leave Management Employee Messaging Payslips & Reports Timesheets Documents

Group Summary Enter Time History Templates Report

Pay: m1 Starting Wednesday, 01 January 2014

Group: All Employees Approve Group Unapprove Group





Pay Status	Employee	Time Hours	Wage Hours	Allow. Units	Sick Leave Hours	Annual Leave Days	LSL Days	Bereav. Leave Hours	Public Holidays Hours	Alt. Leave Accrued Days	Alt. Leave Paid Hours	Days Paid	Relevant Days Paid	Unpaid Hours	
●	Andrews, Thomas Harley	8.00	-	-	-	1.00	-	-	8.00	-	-	-	-	-	✓ X
●	George, Thomas Russell	-	-	-	-	-	-	-	8.00	-	-	-	-	-	X
●	Giles, Harrison Relf	-	-	-	-	-	-	-	-	-	-	-	-	-	
Totals:		-	-	-	-	-	-	-	-	-	-	-	-	-	

x Amount
 * Rate
 † Units

Export Print

Form Field definitions

The table below details each form field in the Timesheet Group Summary window:

Field	Description
Pay Status	 One or more the transactions for the employee have not yet been approved, and therefore cannot be paid.
	 All of the transactions for the employee have been approved, and therefore can be paid.
Employee	This is the full name of the MyStaffInfo employee, to whom that current row's Timesheet transactions belong.
Transaction Types	Every kind of transaction that is payable from MyStaffInfo will be displayed in columns from left to right.
Actions	
	Click this icon to approve the selected pending timesheet.
	Click this icon to unapprove the selected approved timesheet.

Printing and Exporting Timesheets

Click the **Print** button to display a standard print dialog, which will allow you to print the current display of timesheet information.

Click the **Export** button to export the timesheet information as a CSV file.

Enter Time

Here you can enter timesheet information for:

- Timesheets
- Wages
- Leave
- Allowances
- Other

If you are logged in as a manager, you can add entries for other employees and approve pending entries; otherwise you can only add entries for yourself.

MyStaffInfo[™] myob Welcome Wallace, Eddie | Logout

Home | Leave Management | Employee Messaging | Payslips & Reports | **Timesheets**

Group Summary | **Enter Time** | History | Templates

Pay: January 2010 Starting Friday, 01 January 2010

Group: All Employees

Employee: Wallace, Eddie Approve Emp Unapprove Emp

Templates: Full Time Template Apply Template

Previous Pay: Weekly Pay Starting Sunday, 15 July 2012 Apply Previous Pay

Show: All Update

Add Time

Type: Timesheet Add Entries

Timesheet

Employee	Date	Start	End	Break	Units	Wage Type	Rate Code	Cost Centre	S.
Wallace, Eddie	16/07/2012	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default	...
Wallace, Eddie	17/07/2012	00:00	00:00	00:00	00:00	Double Time	2	11 AKJ/Office	...
Wallace, Eddie	18/07/2012	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default	...
Wallace, Eddie	19/07/2012	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default	...
Wallace, Eddie	20/07/2012	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default	...
Wallace, Eddie	21/07/2012	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default	...
Total Units:					00:00				

Wages

Employee	Date	Units	Wage Type	Rate Code	Cost Centre	S.
There are no Wages entries to show at this time.						

Adding Entries

Entries can be added to a timesheet in several ways:

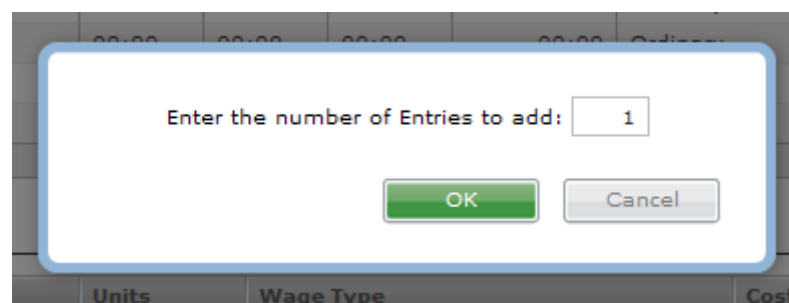
- Entries can be entered manually (see page 62).
- Entries can be loaded from a template (see page 64).
- Entries can be loaded from a previous pay (see page 64).

Note: The availability of templates and previous pay controls is determined by the **Security settings (see page 19)** set up in the Management Console. These controls can be made available to all users, restricted to managers only, or disabled completely.

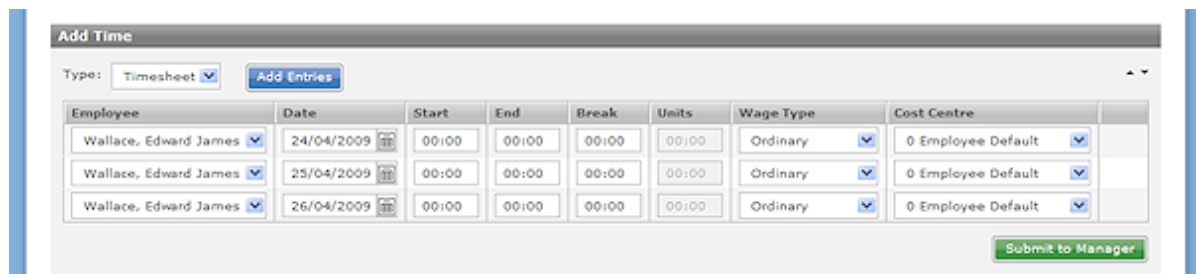
Adding Entries Manually



To add entries:

1. Select the pay to add entries to from the **Pay** drop-down list.
2. If you are not a manager, you can only add entries for yourself. If you are a manager, you can add entries for one or more employees in addition to yourself:
 - To add entries for yourself, select "<My Details>" from the **Group** field.
 - To add entries for a single employee, select a group that the employee belongs to from the **Group** field, then select their name from the **Employee** field.
 - To add entries for a group of employees, select a group from the **Group** field, then select "<Everyone>" from the **Employee** field.
3. Select an entry type from the **Type** drop-down list, then click **Add Entries**. You are asked how many entries you want to add:







4. Enter the required number of entries and click **OK**. The specified number of entries appear as separate rows in the Add Time section:



5. Enter the required information in all fields. The available fields (see page 64) differ depending on the type of entry being added.
6. **Optional:** You can use the  icon to copy a line. For example, if you are entering times for a week and each day is the same, add a single line, enter the details for that line, then make four copies of it for a week's worth of lines. (The date is incremented by one day for each copy.)
7. **Optional:** When adding entries for <Everyone>, you can click the  icon at the right of the line to explode it, creating a separate line for each employee. For example, if you are entering times for a group of employees, which are mostly the same with a few exceptions, add a single entry containing the default details for everyone, then explode it and edit only those employee lines where there are exceptions.
8. Click **Submit to Manager** to send the entries for approval.

TIP: Make good use of **employee groups (see page 16)** to enable quick data entry for multiple employees. Create an employee group for any groups of employees who all work the same hours - you can then add a single entry for <Everyone> in that group. Remember that an employee can belong to multiple groups if necessary.

TIP: Use the  and  actions to add many entries quickly. For example, to add entries for all employees for an entire week, add a single entry for for one day, enter default details for that entry, then use the  action to make copies of it for each day of the week. You can then use the  action to explode any days where there are exceptions to the default data and edit those employee lines where there are exceptions.

Loading Entries from a Template

To load timesheet entries for the selected user(s) from a previously defined template (see page 71):

1. Select the pay to add entries to from the **Pay** drop-down list.
2. If you are not a manager, you can only load template entries for yourself. If you are a manager, you can add entries for one or more employees in addition to yourself:
 - To load entries for yourself, select "<My Details>" from the **Group** field.
 - To load entries for a single employee, select a group that the employee belongs to from the **Group** field, then select their name from the **Employee** field.
 - To load entries for a group of employees, select a group from the **Group** field, then select "<Everyone>" from the **Employee** field.
3. Select the template to load entries from the **Templates** drop-down list.
4. Click **Apply Template**.

The timesheet fields are populated with lines from the selected template. The timesheet lines loaded in can be edited as normal before being submitted for approval.

Loading Entries from a Previous Pay

To load timesheet entries for all users from a previous pay:

1. Select the pay to add entries to from the **Pay** drop-down list.
2. If you are not a manager, you can only load previous pay entries for yourself. If you are a manager, you can add entries for one or more employees in addition to yourself:
 - To load entries for yourself, select "<My Details>" from the **Group** field.
 - To load entries for a single employee, select a group that the employee belongs to from the **Group** field, then select their name from the **Employee** field.
 - To load entries for a group of employees, select a group from the **Group** field, then select "<Everyone>" from the **Employee** field.
3. Select the pay to load entries from the **Previous Pays** drop-down list.
4. Click **Apply Previous Pay**.

The timesheet fields are populated with lines from the selected pay. The timesheet lines loaded in can be edited as normal before being submitted for approval.

Field Definitions and Actions

Field definitions - Timesheet



Field	Description
-------	-------------

Employee	This is the full name of the MyStaffInfo employee, to whom the current row's timesheet transactions belong.
Date	The date that this entry pertains to. There can be multiple entries made on the same date. Normally, you would start with five entries, one for each day of the week.
Start End	The start time must be in the same actual day to match the date entered. So, for example if the employee begins a night shift at 10PM on 24/11/2009 and finishes at 6AM on 25/11/2009, the user should enter "24/11/09" in the Date field, "22:00" in the Start field and "06:00" in the End field.
Break	This is the total duration of breaks throughout the shift, expressed as a time value (HH:MM). For example, if the employee has two 15-minute breaks and one hour for lunch, the total is 1 hour 30 minutes and should be entered as "01:30".
Units	This value is automatically calculated, and equates to the End time less the Start time less the Break time. Depending on what is chosen for the Display timesheet time units as option on the Company Settings page (see page 75), the value will be displayed as either a decimal amount, or in hours and minutes.
Wage Type	This field is only visible for installations that have the option to use multiple Hourly Wage Rate codes turned on in the Special Options Setup screen of Exo Payroll. This option allows an employee to have up to 9 different Hourly Rates, which are coded from 1 to 9. The actual Hourly Wage Rates are stored in the respective employee's Hourly Rates screen in Payroll, the default code being 1, for the base Hourly Rate.
Cost Centre	The Cost Centre that this transaction will be recorded against on the Costing Analysis report in Exo Payroll. If the value is left at zero, the transaction is to be costed to the employee's default Cost Centre. If you want to cost the transaction to some other Cost Centre, select a code here.

Field definitions - Wages

Field	Description
Date	The date that this entry pertains to. There can be multiple entries made on the same date.
Units	This is the amount of hours worked for this date and wage type in a decimal format. For example, eight hours and 30 minutes is entered as "8.5".
Wage Type	This corresponds to the Pay Rate Types established in Payroll, the default value being Ordinary Time.
Cost Centre	The Cost Centre that this transaction will be recorded against on the Costing Analysis report in Exo Payroll. If the value is left at zero, the transaction is to be costed to the employee's default Cost Centre. If you want to cost the transaction to some other Cost Centre, select a code here.

Field definitions - Leave

Field	Description
Date	The date that this entry pertains to. There can be multiple entries made on the same date.
Leave Type	Select a leave type from the drop-down list: <ul style="list-style-type: none"> • Personal Leave • Annual Leave • Long Service Leave • Lieu Time • Rostered Day Off • Unpaid Leave
Units	The amount of leave to be applied is entered here. This figure may represent days or hours, depending on the leave type and the setting in Exo Payroll. The  icon indicates that more information is available. Hover the mouse pointer over this icon to bring up more information on the number of units to pay.
Reduce	The amount to reduce this employee's entitlement. This figure may represent days or hours. The amount to reduce will be expressed in the same manner (days or hours) as the Units data entry item. If the amount to reduce must always equal the amount paid, this data entry item will be disabled. The  icon indicates that more information is available. Hover the mouse pointer over this icon to bring up more information on the number of units to reduce the leave entitlement by.
Cost Centre	The Cost Centre that this transaction will be recorded against on the Costing Analysis report in Exo Payroll. If the value is left at zero, the transaction is to be costed to the employee's default Cost Centre. If you want to cost the transaction to some other Cost Centre, select a code here.

Field definitions - Allowances

Field	Description
Employee	This is the full name of the MyStaffInfo employee, to whom the current row's Timesheet transactions belong.
Date	The date that this entry pertains to. There can be multiple entries made on the same date.
Code	This corresponds to the Allowance names set up in Exo Payroll. Select an Allowance from the drop-down list.
Units	The amount of this Allowance to be applied is entered here. Depending on the type of Allowance, this may be a number of units, a dollar amount, or a percentage rate. If this field is read-only, it indicates that the amount has been pre-set in Exo Payroll.




Cost Centre The Cost Centre that this transaction will be recorded against on the Costing Analysis report in Exo Payroll. If the value is left at zero, the transaction is to be costed to the employee's default Cost Centre. If you want to cost the transaction to some other Cost Centre, select a code here.

Field definitions - Other

Field	Description
Employee	This is the full name of the MyStaffInfo employee, to whom the current row's Timesheet transactions belong.
Date	The date that this entry pertains to. There can be multiple entries made on the same date.
Other Type	This column contains one option: <ul style="list-style-type: none"> Hours Paid for Holiday Pay - Hours Paid is necessary for users who do not have Pay Period Valuation turned on in their company holiday pay setup. This field requires the number of hours paid for holiday pay purposes.
Units	The amount of hours to be applied is entered here.

Actions

The following action icons are available for all entry types.

Icon	Description
	This icon is available when a manager is editing all members of a group, i.e. when <Everyone> is selected in the Employee column. Click this icon to "explode" this line into separate lines for each employee in the group.
	Click this icon to create copies of the selected entry. Enter the number of copies you want to make on the window that appears, then click OK to create the specified number of entries containing the same data as the original.
	Click this icon to delete the selected entry.

Viewing and Editing Existing Entries

All existing entries are displayed in separate sections underneath the Add Time section, where they can be viewed and edited (provided they are still pending). The filters at the top of the screen let you view approved entries, unapproved (i.e. pending) entries, or all entries.

The ▲ ▼ icons at the top of each section let you jump from one section to the next.


The fields for each section are the same as those that are available when adding entries. Columns at the right of each section contain icons that indicate each line's status, and available actions for each entry.


Icon	Description
Status	
	Pending

 Approved

 Downloaded

Actions

 Click this icon to edit the selected pending entry.

 Click this icon to delete the selected entry.

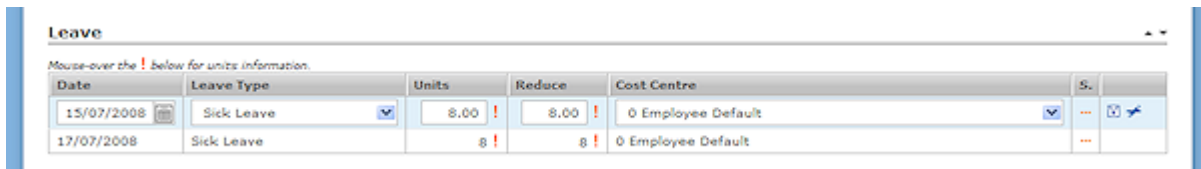
 Click this icon to approve the selected pending entry (Managers only).

 Click this icon to unapprove the selected approved (Managers only).

If you are logged in as a manager, buttons are available at the top of the screen to approve or unapprove all entries for the selected employee or group.


Editing Entries


Clicking the  icon next to a pending entry makes that line editable:



Date	Leave Type	Units	Reduce	Cost Centre	S.
15/07/2008	Sick Leave	8.00	8.00	0 Employee Default	
17/07/2008	Sick Leave	8	8	0 Employee Default	

You can edit the information in each field in the same way as when the entries were first added.

Click the  icon to save your changes.

Click the  icon to cancel your changes.

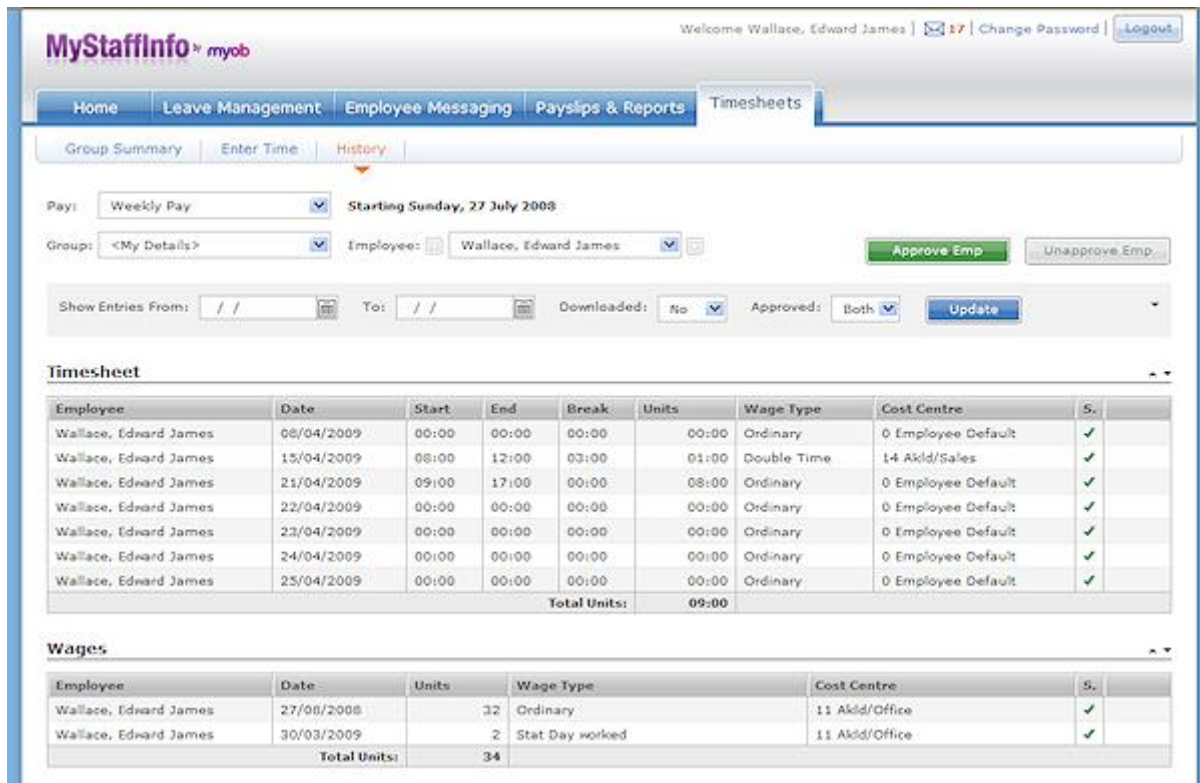
Printing and Exporting Timesheets

Click the **Print** button at the bottom of the page to display a standard print dialog, which will allow you to print the current display of timesheet information.

Click the **Export** button to export the timesheet information as a CSV file.

History

The History tab lets you view a filtered list of timesheets.



Timesheets are displayed in sections as they appear on the Enter Time screen (see page 61).

The ▲ ▼ icons at the top of each section let you jump from one section to the next.

Columns at the right of each section contain icons that indicate each line's status, and available actions for each entry.

Icon	Description
Status	
...	Pending
✓	Approved
✓	Downloaded
Actions	
	Click this icon to edit the selected pending entry.
	Click this icon to delete the selected entry.
	Click this icon to approve the selected pending entry (Managers only).
	Click this icon to unapprove the selected approved (Managers only).

If you are logged in as a manager, buttons are available at the top of the screen to approve or unapprove all entries for the selected employee or group.

Filtering Timesheets

To filter the displayed timesheets, select options from the filters at the top of the screen, then click **Update**. The following filter options are available:

Field	Description
Pay	Select the pay to display entries for.
Group	<p>The group (see page 14) selector will only be visible for employees who are also marked as Managers (see page 10). The default group is named <My Details>. This particular group is not a true employee group - it is merely a placeholder for managers to access their own timesheets without having to first select the employee group to which they themselves belong.</p> <p>In the situation of the Manager being responsible for more than one employee group, it is important that the correct group is selected from the list box, so that in turn, the appropriate set of employees in that group are accessible to match transactions against. Take care to ensure that each group is activated in succession – if you miss the selection of a group, you will also have missed out all of the employees belonging to that group.</p>
Employee	This is the full name of the currently highlighted member of staff, and indicates to the Manager that the timesheet being reviewed is for one of their subordinates.
Show Entries From To	Enter dates to filter the entries by. Only entries whose dates fall within the specified range will be displayed.
Downloaded	<p>Select one of the following items:</p> <ul style="list-style-type: none"> • Yes - Displays the manager-approved transactions only – useful if some of the transactions have been deliberately not approved and will not be imported into the Exo Payroll Current Pay. • No - Prints transactions that have not yet been approved by a manager. This enables you to work exclusively with transactions which have not yet been signed off. If this query returns no results, and all of the necessary data has been entered, it can be assumed that the timesheet is ready for import into the Exo Payroll Current Pay. • Both - Displays all transactions in the pay – useful for a final report.
Approved	<p>Select one of the following items:</p> <ul style="list-style-type: none"> • Yes - Displays the manager-approved transactions only – useful if some of the transactions have been deliberately not approved and will not be imported into the Exo Payroll Current Pay.

- **No** - Prints transactions that have not yet been approved by a manager. This enables you to work exclusively with transactions which have not yet been signed off. If this query returns no results, and all of the necessary data has been entered, it can be assumed that the timesheet is ready for import into the Exo Payroll Current Pay.
- **Both** - Displays all transactions in the pay – useful for a final report.

Printing and Export Timesheets

Click the **Print** button to display a standard print dialog, which will allow you to print the current display of timesheet information.

Click the **Export** button to export the timesheet information as a CSV file.

Templates

The Templates page is only accessible to users who have the **Manage My Template** and/or **Manage Group Templates (Manager)** security settings enabled in the MyStaffInfo Management Console (see page 20). You can populate the timesheet with a pattern of default values that represent the employees' regular/rostered/contracted hours. A template may be used for any regular or irregular work pattern of any duration, providing that the work pattern can be predetermined. You can create templates for weekly wages, monthly bonuses, Christmas holidays, and so on.

The screenshot shows the MyStaffInfo web interface. At the top, there is a navigation bar with tabs for Home, Leave Management, Employee Messaging, Payslips & Reports, and Timesheets. Below this is a sub-navigation bar with options for Group Summary, Enter Time, History, and Templates. The main content area includes a search area for templates with dropdowns for Templates (Full Time Template), Group (All Employees), and Employee (Wallace, Eddie). Below this is an 'Add Template' section with a form to create a new template, including fields for Type (Timesheet), Add Entries button, for the selected (Employee), and starting on day (Monday). The main content area is divided into two sections: 'Timesheet' and 'Wages'. The 'Timesheet' section contains a table with columns for Week, Day, Start, End, Break, Units, Wage Type, Rate Code, and Cost Centre. The 'Wages' section contains a similar table with columns for Week, Day, Units, Wage Type, Rate Code, and Cost Centre.

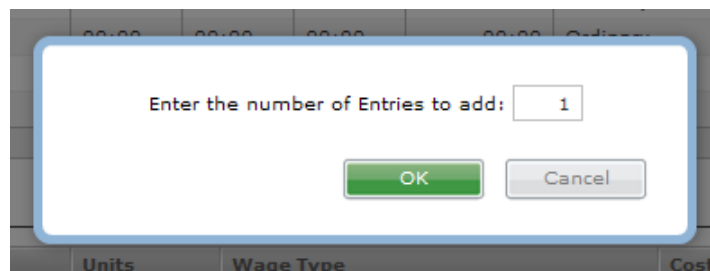
Week	Day	Start	End	Break	Units	Wage Type	Rate Code	Cost Centre
1	Monday	09:00	17:30	00:30	08:00	Ordinary	0	0 Employee Default
1	Tuesday	09:00	17:30	00:30	08:00	Ordinary	0	0 Employee Default
1	Wednesday	09:00	17:30	00:30	08:00	Ordinary	0	0 Employee Default
1	Thursday	09:00	17:30	00:30	08:00	Ordinary	0	0 Employee Default
1	Friday	09:00	17:30	00:30	08:00	Ordinary	0	0 Employee Default
					Total Units: 40:00			

Week	Day	Units	Wage Type	Rate Code	Cost Centre
1	Monday	8	Ordinary	0	0 Employee Default
1	Tuesday	8	Ordinary	0	0 Employee Default
1	Wednesday	8	Ordinary	0	0 Employee Default
1	Thursday	8	Ordinary	0	0 Employee Default
1	Friday	8	Ordinary	0	0 Employee Default
		Total Units: 40			

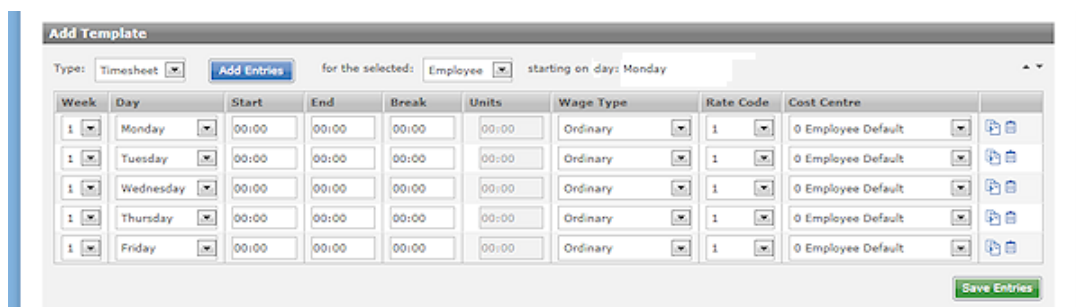
Adding Template Entries


To add entries to a template:

1. If you are a manager, you can select the template to add entries to from the **Templates** drop-down list. As well as the templates set up in the Management Console (see page 27), there is a "<My Template>" option, which is a personal template specific to the logged on manager. If you are an employee, you cannot select a template to edit - you always edit your own personal template.
2. If you are not a manager, you can only add entries for yourself. If you are a manager, you can add entries for one or more employees in addition to yourself:
 - To add entries for yourself, select <My Details> from the **Group** field.
 - To add entries for one or more employees, select a group that the employee belongs to from the **Group** field, then select a name from the **Employee** field.
3. Specify details of the new entries:
 - Select an entry type from the **Type** drop-down list.
 - Managers can choose to add entries for the employee selected in the **Employee** field, for all employees in the group selected in the **Group** field or for all employees in all groups.
 - Select the day of the week that the entries should start from, e.g. if "Tuesday" is selected and three entries are added, they will default to Tuesday, Wednesday and Thursday.
4. Click **Add Entries**. You are asked how many entries you want to add:



5. Enter the required number of entries and click **OK**. The specified number of entries appear as separate rows in the Add Template section:



6. Enter the required information in all fields. The available fields (see page 73) differ depending on the type of entry being added.
7. **Optional:** You can use the  icon to copy a line. For example, if you are entering times for a week and each day is the same, add a single line, enter the details for that line, then make four copies of it for a week's worth of lines.
8. Click **Save Entries** to save the new lines to the template.

Field Definitions and Actions

Field definitions for each section are mostly the same as they are when entering lines on the Enter Time screen:

- Timesheet (see page 64)
- Wages (see page 65)
- Leave (see page 66)
- Allowances (see page 66)
- Other (see page 67)

Exceptions are that no Employee is specified when editing template lines, and where timesheet entries require a specific **Date**, templates use a generic **Week** and **Day** combination.

Templates and Days of the Week

A **Week** and **Day** are defined for each line in a template; however, when the template is applied to a pay on the Enter Time page (see page 61), the days specified in the template may not correspond to the days in the pay exactly, especially if the pay starts on a different day of the week than the first day specified in the template. In these cases, the template "wraps around" to the next week, so that all days in the template are included.

For example, a template is set up with one week and five days from Monday to Friday. A manager goes to the Enter Times page and applies the template to a pay starting on Wednesday the 18th; this will generate lines for the following days:

- Wednesday the 18th
- Thursday the 19th
- Friday the 20th
- Monday the 23rd
- Tuesday the 24th





Even though the pay did not start on the same day as the template, lines are created for all days in the template - the Monday and Tuesday lines wrap around to the next week.

Viewing and Editing Existing Entries

All existing entries are displayed in separate sections underneath the Add Template section, where they can be viewed and edited (provided they are still pending). The filters at the top of the screen let you view approved entries, unapproved (i.e. pending) entries, or all entries.

The ▲ ▼ icons at the top of each section let you jump from one section to the next.

The fields for each section are the same as those that are available when adding entries. Columns at the right of each section contain icons that indicate available actions for each entry.

Icon	Description
	Click this icon to edit the selected pending entry.
	Click this icon to delete the selected entry.
	While editing, click this icon to save your changes.
	While editing, click this icon to cancel your changes.

Printing Templates

Click the **Print** button at the bottom of the page to display a standard print dialog, which will allow you to print the current display of template information.

Timesheet Reports

Reports detailing timesheet batches and/or templates can be produced from the Report page.

Select reporting options and click **Print** to produce a report.

Reporting Options

Field	Description
Select a Batch/Template	
Type	Select "Batch", "Template" or "All" to filter the Name dropdown by the type of entity you want report on.
Status	Select "Open", "Closed" or "All" to filter the Name dropdown by the batch/template status you want to report on.
Name	Select the specific batch/template to report on.
Select a Group	
Show Groups	To report on all groups, select "All"; to specify a group to report on, select "Selected".
Name	If "All" was selected for the Type, this field is not editable; otherwise select the group to report on.
Select an Approval Status	
Approved	Select "Yes", "No" or "Both" to filter the report by approval status.

Administration

The Administration functions are only accessible by the person who is marked as the website administrator in the Management Console (see page 22).

The associated page tabs for this section are:

- Company Settings (see page 75)
- Display Options (see page 79)

Company Settings

The Company Settings page section provides functions for the administrator of the website. Use only under the direction of the Helpdesk.

The screenshot shows the MyStaffInfo Administration interface. At the top right, it says 'Welcome Super-User | Logout'. Below the navigation bar, there are tabs for 'Administration', 'Company Settings', and 'Display Options'. The 'Company Settings' tab is active. The page is divided into three sections:

- Locked Out User Accounts:** A table with columns 'User', 'Number of Attempts', and 'Date Locked Out'. One user, 'Wallace, Eddie', is listed with 4 attempts and a lockout date of '09/07/2012 11:45:28'. Below the table is a checkbox labeled 'Release Locks' and a 'Save' button.
- Units Format:** A section with a label 'Display timesheet time units as:' and a dropdown menu set to 'Minutes'. Below it, it says 'Displays total time in HH:MM format e.g. 7hrs 36mins = 07:36' and a 'Save' button.
- International Settings:** A section with a 'Time Difference:' input field set to '0.00' and '(hours)' below it. It also shows 'Current Server Time is: Monday, 09 July 2012, 09/07/2012 11:45:36' and a 'Save' button.

Administration functions are grouped into the following sections:

- Locked Out User Accounts (see page 75)
- Units Format (see page 76)
- International Settings (see page 76)
- Password Settings (see page 76)
- Locator Board Settings (see page 77)
- Email Settings (see page 78)
- Notification Settings (see page 78)

Locked Out User Accounts

As a security precaution, users who fail more than six consecutive login attempts in 30 minutes will be locked out of the system. All locked out users are displayed here (if there are no locked out users, this section will not appear). Tick the **Release Locks** box and click **Save** to remove the lockout and allow these users to log in again.

Units Format

The **Display timesheet time units as** option determines how times will be displayed on timesheets. Choose from:

- Minutes – times are displayed in HH:MM format.
- Decimal – times are displayed as decimal values, rounded to two decimal places.

For example, a time of 7 hours and 36 minutes would be displayed as “7:36” if the “Minutes” option is selected and as “7.60” if the “Decimal” option is selected.

International Settings

Time difference

The MyStaffInfo web server is situated in Sydney, Australia. If you are situated in a different time zone (e.g. New Zealand) you can adjust for the time difference. For example, enter -2.00 if you are two hours ahead of Sydney time. If you are using the Timesheet component of MyStaffInfo, it is advisable to only make time adjustments at the very end of the day (before employees have clocked out), or at the very start of the day (before employees have clocked in).

Current Server Time is

Here you will see the date and time according to the MyStaffInfo web server. If the server time is different from your PC's date and time by an increment of 1 or more hours, it is advisable to make an adjustment for the time difference.

Password Settings

Many people are of the belief that their personal password should be whatever they can most easily remember. Therefore, nouns, i.e. names of objects, and proper nouns, i.e. names of people, are overwhelmingly popular. These should be avoided – obvious passwords, such as your spouse's name, or the make of your vehicle, are a security risk. MyStaffInfo is an Internet application – anyone with knowledge of your company ID could attempt to guess your user name your password.

Password Settings

Allow users to change passwords

Minimum Password Length:

Maximum Password Length:

Minimum Letters Used in Password:

Minimum Numbers Used in Password:

Minimum Non-Alphanumeric Chars Used in Password:

Mixed-Case Passwords Required

Allow users to change passwords

It is a good idea to periodically replace old passwords with new ones – this reduces the likelihood of unauthorised access to the website, should a person's login details be misappropriated. All passwords should follow a set naming convention, ensuring consistent usage of letters and numbers.

Minimum Password Length

Longer passwords are more difficult to guess. A sensible default value is five characters.

Maximum Password Length

Passwords that are too long are time-consuming to enter and are prone to being mis-keyed. A sensible default value is 20 characters.

Minimum Letters Used in Password

It is advisable to use a combination of numbers and letters in passwords. Enter the minimum number of alphabetical characters that passwords must contain. In the example of a naming convention based on an AB123 standard, the value of this field would be 2.

Minimum Numbers Used in Password

It is advisable to use a combination of numbers and letters in passwords. Enter the minimum number of numerical characters that passwords must contain. In the example of a naming convention based on an AB123 standard, the value of this field would be 3.

Minimum Non-AlphaNumeric Chars Used in Password

Passwords can optionally contain characters that exist on a standard 101/102-Key or Microsoft Natural keyboard, but are neither letters nor numbers. For example: ! @ # \$ % ^ & * () _ + \. Enter the minimum number of non-alphanumeric characters that passwords must contain.

Mixed-Case Passwords Required

If this option is selected, passwords must contain a combination of both lower case and uppercase letters. This makes the password more difficult for someone to guess.

Locator Board Settings

Locator Board Status List

The employee's Locator Board status (see page 40) denotes their current whereabouts. This can be useful when determining an appropriate method of communication, should the employee need to be contacted quickly. The contents of the locator board can also be printed out, as a standard operating procedure in the case of an evacuation.

The screenshot shows a web form titled "Locator Board Settings". It contains three main sections, each with a text input field and a list of status options:

- LocatorBoard Status List:** (One per line). Below the text box is a list: In, Out, Lunch, Holiday, Sick.
- LocatorBoard Status Requiring DueBack Date:** (One per line, must be present above). Below the text box is a list: Out, Holiday, Sick.
- LocatorBoard Status Requiring DueBack Time:** (One per line, must be present above). Below the text box is a list: Out, Lunch, Holiday.

A green "Save" button is located at the bottom right of the form.

Enter status options in this text box, one per line (press ENTER after each option to start a new line). New options can be added at any position on the list, and existing entries can be over-typed to change them.

To delete a status option, press the backspace key to delete any or all of the text on a line.

Locator Board Status Requiring Due Back Date/Time

Some status lines are representative of the employee being unavailable for a fixed number of days, after which they are expected to become available again. For example, as of closing time today, the employee is due back in two days, because they will be on leave for one day, starting tomorrow. This aids a person who is fielding a call for another person, in determining an appropriate time for the caller to try again.

If an employee changes their status to one of the options listed in these windows, the Due Back date and/or time options on the Locator Board screen become available so that the employee can indicate when they will be back.

Email Settings



Email Settings

Email "From" Name:

Email "From" Address:

Email "From" Name

This is the name/title of the person who is responsible for the notification emails that will be generated from MyStaffInfo, i.e. the website administrator.

Email "From" Address

This is the internet Email address of the person who is responsible for the notification emails that will be generated from MyStaffInfo, i.e. the website administrator.

Notification Settings

Notify employees by email when...

The MyStaffInfo server can send an email to the appropriate staff whenever the following events occur:

- New news items have been posted
- New messages are received
- New leave requests are received (or cancelled)
- Staff Information is updated
- Leave requests are accepted
- Leave requests are declined
- New payslips or reports are available

Notify employees by email when new Messages are received

Message Updates Enabled

Message Updates Subject: mystaffinfo.com - New Messages

Message Updates Message:
You have new messages on the mystaffinfo website. Please visit <https://mystaffinfo.myob.com> to view them.

Save

Notify employees by email when new Leave Requests are received

Leave Request Updates Enabled

Leave Request Updates Subject: mystaffinfo.com - New Leave Requests

Leave Request Updates Message:
You have new leave requests to process on the mystaffinfo website. Please visit <https://mystaffinfo.myob.com> to view them.

Save

For each event, there is an **Updates Enabled** check-box. Tick this to enable automatic creation and sending of this type of email.

Subject

The subject line included in all emails generated for this event.

Message

The body of the message included in all emails generated for this event.

NOTE: For leave request events, the message also contains auto-generated information about the employee who made, accepted or declined the request and the type of leave that was requested.

Display Options

The Display Options page lets an administrator determine which of the following entities are visible on the website:

- Wage Types
- Cost Centre Codes
- Allowance Codes

MyStaffInfoTM myob Welcome Super-User | [Logout](#)

Administration

Company Settings **Display Options**

Visible Wage Types

Wage Type	Visible?
Ordinary	<input checked="" type="checkbox"/>
Time & Half	<input checked="" type="checkbox"/>
Double Time	<input checked="" type="checkbox"/>
Public Holiday	<input checked="" type="checkbox"/>
Stat Day worked	<input checked="" type="checkbox"/>
Day in Lieu	<input checked="" type="checkbox"/>
Special	<input checked="" type="checkbox"/>
Sick Leave	<input checked="" type="checkbox"/>
Undefined	<input checked="" type="checkbox"/>

[Save](#)

Visible Cost Centre Codes

Cost Centre Code	Visible?
11 Akld/Office	<input checked="" type="checkbox"/>
12 Akld/Reception	<input checked="" type="checkbox"/>
13 Akld/Sales Promotion	<input checked="" type="checkbox"/>
14 Akld/Sales	<input checked="" type="checkbox"/>
15 Akld/Packaging	<input checked="" type="checkbox"/>
16 Akld/Delivery	<input checked="" type="checkbox"/>
21 Ham/Office	<input checked="" type="checkbox"/>
22 Ham/Reception	<input checked="" type="checkbox"/>
23 Ham/Sales Promotion	<input checked="" type="checkbox"/>
24 Ham/Sales	<input checked="" type="checkbox"/>
25 Ham/Packaging	<input checked="" type="checkbox"/>
26 Ham/Delivery	<input checked="" type="checkbox"/>

[Save](#)

Visible Allowance Codes

Allowance Code	Visible?
1 Clothing Allowance	<input checked="" type="checkbox"/>

All wage types, cost centre and allowances set up in MYOB Exo Payroll are listed on this page. Tick or clear the **Visible?** box next to each entity to determine if it will appear on the MyStaffInfo website or not.

Click one of the **Save** buttons to commit your changes.

Contact Us

In addition to our offices in New Zealand and Australia, MYOB has software distributors all over the South Pacific, who can assist you with all kinds of MYOB-related products and services. For a distributor list, please contact us as detailed below.

Australia

Sales Phone 1300 555 110

Support Phone 1800 836 226

Support Email anzpayrollsupport@myob.com

Registration Fax 1800 004 587

Registration Email exo.services.au@myob.com

Web Site www.myob.com.au/enterprise

New Zealand

Sales Phone 0800 MYOB EXO

Support Phone 0800 MYOB EXO

Support Email anzpayrollsupport@myob.com

Registration Fax 0508 329 729

Registration Email exoservices@myob.com

Web Site www.myob.co.nz/enterprise

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