MYOB Exo Employee Information

User Guide

2021.04

myob

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Introduction

With the introduction of the Employment Relations Act 2000, which came into force in October 2000, the need to manage the area of Human Resource has become more important.

The system has been designed to adapt to your particular organisation's requirements while still providing a structured start.

Employee Information can run fully integrated with MYOB Exo Payroll, or alternatively as a standalone product.

It is important to remember when setting up your Employee Information system that you initially concentrate on the areas that are important to your organisation, such as training. By setting up one area at time and fine tuning to suit your requirements before going onto the next area you will be building a highly effective system.

Getting Started with MYOB Exo Employee Information

Before you get underway with setting up MYOB Exo Employee Information we suggest that you take the time to familiarise yourself with the general structure and overview of the system.

We recommend working your way around the Demonstration Company that is installed with the package. This will help you learn how to navigate through the various windows and enhance your understanding of the information required to set up your company.

Start the software by double-clicking on the MYOB Exo Employer Services icon on your desktop or click the Windows Start button and choose the program from Programs > MYOB Exo Employer Services.

The first thing you will see is the MYOB Login Screen with the Demonstration Company in the list of payrolls. Exo Employee Information is a multi-company system (you can have unlimited additional companies). Once you add your own company, its name will appear in this list.
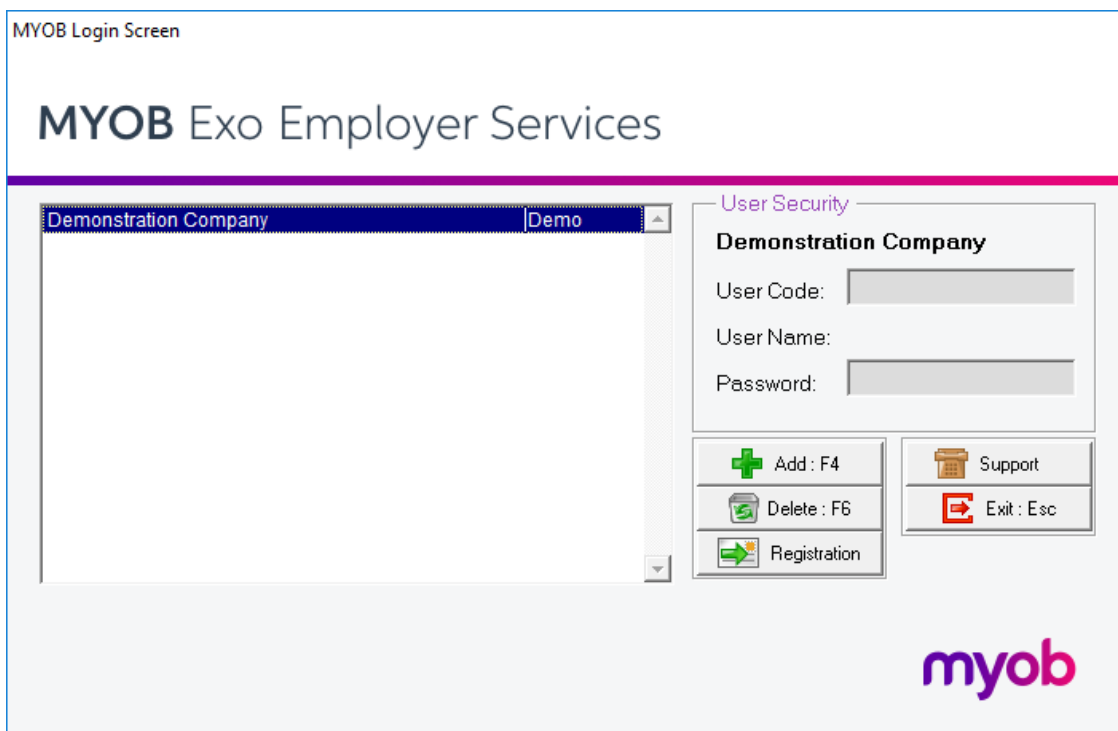
The Demonstration Company line will be highlighted. To open a company, either select a company and press enter or double-click on it. You must enter the logon details of a user account that has been set up in the Exo Employee Information system.

After logging in, you are presented with the main window:
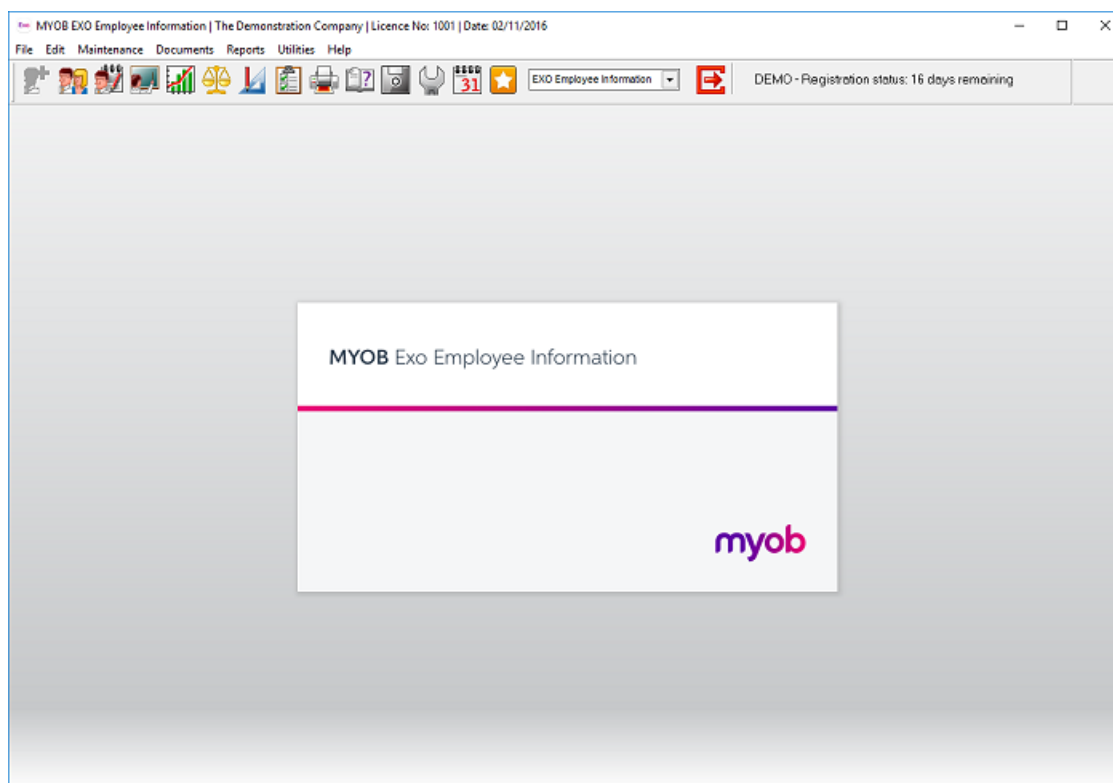
The main window includes the following interface features:

- All functions are available from the main menus (see page 2).

- Important functions can be accessed by clicking on the icons on the main Toolbar (see page 6). Hovering the mouse pointer over these icons (without clicking) will display tool tips, which indicate what part of the payroll they access.

- Keyboard shortcuts are available for common operations.

Once you are familiar with the interface, you can begin to perform the main functions of the Exo Employee Information system:

- Setting up the details of your company (see page 9)

- Maintaining employee records

- Printing reports (see page 97)

The Menus

The menu is the main starting point in Exo Employee Information and allows access to all areas of the system.

File Menu

Menu Item	Description
New Employee	Add a new employee (see page 22) into Exo Employee Information, in preparation for logging an Accident and/or Claim against that employee.
Open Employee	Access an existing employee (see page 63) to edit contact details, risk area, training received and job requirements.
Terminate/Reinstate	Mark ex-employees as no longer being current, i.e. not affecting your annual license levels. Reinstate the employee if they return.
Change Company	Exit to the MYOB Login Screen (see page 1) in order to select a different company.
Exit	Exit from the program and close down all related files.

Edit Menu

Menu Item	Description
Undo	Reverse the last keyboard action
Redo	Repeat the last keyboard action
Cut	Move the selected text into the Windows clipboard
Copy	Copy the selected text into the Windows clipboard
Paste	Copy the contents of the Windows clipboard to the current cursor position
Clear	Clear the contents of the currently selected data entry field
Select All	Select the entire data entry field from the current cursor position

Maintenance Menu

Menu Item	Description
Candidates	Record contact details for job applicants (see page 65), and attach a CV if appropriate. Candidates can be converted to employees at a later stage.
Career Plan Goals	List of career ambitions (see page 68) that can be combined in any order to form a career plan.
Employee Groups	Set up grouping of employees outside of departments (see page 12). This could be grouping of different positions e.g. Managers. Office Staff, Account Managers, etc. or areas of employees e.g. Administration, Sales etc.
Exit Interviews	This function allows you to set up Exit Interview procedures based on Company requirements. Exit interviews are made up of individual points (see page 69), which are combined into Exit Interview Plans (see page 69).
Induction	This function allows you to set up Induction checklists based on your companies specific requirements. Inductions are made up of individual bullet points (see page 71), which are combined into Induction Plans (see page 72).
Note Types	You are able to set up additional note types (see page 73) and default note format.
Performance Review	This function allows you to set up Performance review formats. Performance reviews are made up of individual points (see page 75), which are combined into Performance Review Plans (see page 69).
Position	This function allows you to design and maintain the positions (see page 14) that employees hold.
Skills	This function allows you to establish and maintain a database of skills (see page 78) that can be applied to employees.
Tasks/Duties	This function allows you to establish and maintain a database of tasks or duties (see page 80) that can be applied to employees.
Training	This function allows you to create a list of Training Providers (see page 83) and Training Courses (see page 85), either internal or external.
Lookup Tables	This function allows you to create and maintain the lookup tables (see page 89) for Benefit Type, Ethnicity, Place of Birth, Language, Training Course Duration, Disciplinary Descriptions, Qualification/Education, and Skills.

Documents Menu

Menu Item	Description
Company Documents	Attach company documents relating to human resources in general.
Document Templates	This allows you to set up document templates (see page 95).
Visitor Log	The OSH department requires that companies keep an up-date visitor log (see page 96); this requirement is part of the health and safety auditing process.

Reports Menu

Menu Item	Description
Print Reports	This opens the list of available reports (see page 99).
Clarity Report Writer	This utility enables you to create your own customised reports.
ReportWriter	This is an older utility for customising reports.

Utilities Menu

Menu Item	Description
Backup	Allows you to backup your data at any time to either floppy disks or your hard drive.
Restore	This is used when you need to restore a backup due to hardware failure or corruption.
File Reindex	This is a file repair utility.
Setup Exo Employee Information	Configure the company for use (see page 10).
User Security	This is where you set up the various users who will have access to the payroll and allocates what rights they have. MYOB Exo Employee Information is a multi-user system.
Security Groups	This allows you to restrict user security access to a subset of your employees (see page 107), rather than seeing all employees in the system.
Event Tracking	Setting up rules for tracking changes in employee data (see page 108).
Event Log	A log of changes (see page 107) made within the system for auditing purposes.

| Backup Options | This allows you to configure settings that affect backups of your data. |

Help Menu

Menu Item	Description
Help Topics	Opens the online Help. Help can also be accessed anywhere in the program by pressing F1.
MYOB Education Centre	Opens the MYOB Education Centre website in a web browser.
What's New in this Release	Opens PDF release notes, detailing new features and resolved issues in the current version.
Online Knowledgebase	Opens the MYOB Enterprise Knowledgebase website in a web browser.
Show Reminders	Displays all employee notes with Reminder dates up to today's date that have not yet been marked as completed.
Setup Cycle	This is used to access the Setup Cycle (see page 9) when initially setting up a company.
Upgrade Software	This is a tool with which you can upgrade your current version of software (see page 109), providing you have the most recently available CD.
Upgrade Software Online	This function accesses the Internet to upgrade your current version of MYOB software online (see page 111).
About	Shows the current version number and MYOB contact details. Press F11 at any time to view the About window independently of the menu.

The Toolbar

The following icons are available in the toolbar of the main Exo Employee Information interface:

Icon	Function	Description
	New Employee	Add an employee to Exo Employee Information (see page 22). If you have an integrated system (Exo Payroll and Exo Employee Information) all new employees must be added through Exo Payroll.
	Edit Employee	Access existing Exo Employee Information employees (see page 22) and related items for the purpose of editing/reviewing.
	Employee Notes	Opens the selected employee's personnel notes. This window can also be accessed via the F12 key.
	Training	Access to centralised database of employees training records
	Performance Review	Access to centralised database of employees Performance Review records
	Disciplinary Action	Access to centralised database of employees Disciplinary Action
	Skills	Access to centralised database of employees Skills
	Tasks & Duties	Access to centralised database of employees Tasks and Duties
	Print Reports	Opens the list of available reports.
	Help	This provides you with extensive Help relating to the setting up and the running of your Health and Safety. Help can also be accessed anywhere in the program by pressing F1.
	Backup	This is a facility to archive a copy of your data files, in the case of needing to Restore/Rollback to them at some point.
	Maintenance	Provides quick access to the Maintenance Form – a central access point for your Exo Employee Information-related masterfiles.
	Diary	Opens the Diary, which is a form of a daily planner, giving you a place to enter comments on any given day, for Payroll company-related tasks, appointments and reminders.
	Show Items	Opens a window showing all available toolbar icons, where you can choose which icons to display and which to hide.
	Exit	Closes the application and returns to Windows.

Setting up EXO Employee Information

Adding a Company

MYOB Exo Employee Information can have unlimited "live" companies in the same program, in addition to the Demonstration Company.

After opening Exo Employee Information, the first screen that appears is the MYOB Login Screen.
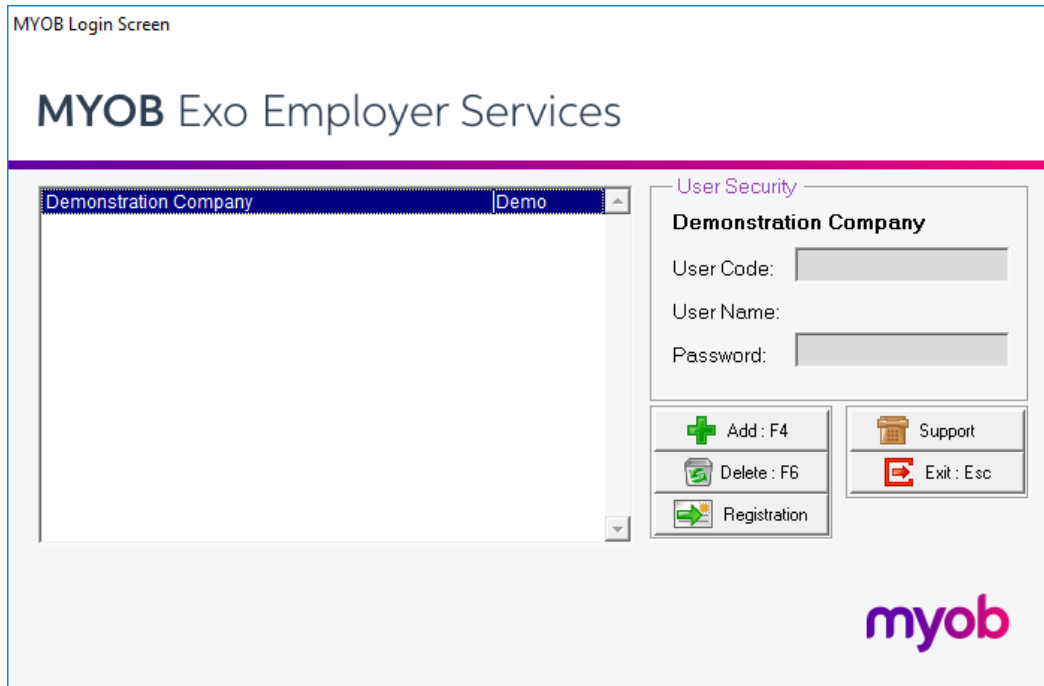
This screen allows you to add a new company, as a separate entity from the Demonstration Company. Click **Add** or press F4 to add a Company. The following screen appears:
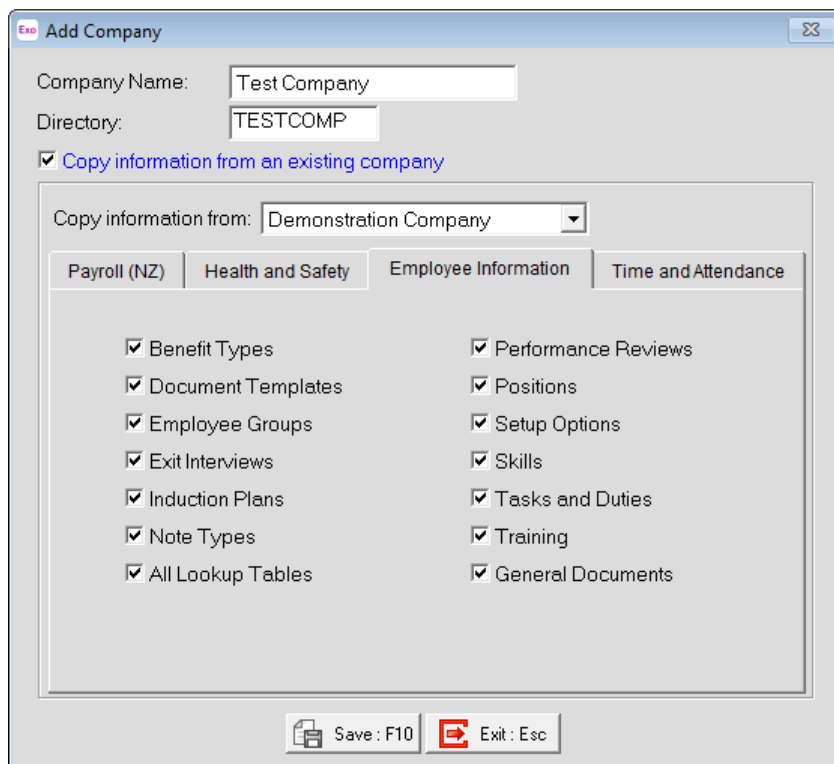
Company Name Enter the name for the new company. This is the name that will appear in the list of companies.

Directory The directory name will be automatically generated for you, based on the first few characters of your company name.

Copy information from an existing company This option allows you to copy the basic set up data from another company if one exists.

Tick the **Copy Information From** box, and select the closest matching company from the list. If in doubt, choose the Demonstration Company. You will then be able to specify which areas of the other company you wish to copy by ticking the appropriate boxes.

Once the procedure is complete click **Save** or press F10 and you will be taken to your new company.

Once in the new company you will be presented with the Setup Cycle screen (see page 9). This screen will step you through the process of configuring the various essential settings.

Deleting Companies

If you wish to delete a company for any reason, select the company on the Login Screen and click **Delete** or press F6. You are then prompted for the name of the company to delete. Select by clicking on the company of your choice. You are then asked to confirm that you want to delete this company. Click **No** to cancel, or click **Yes** to proceed. Before you delete any companies forever, it is recommended that you make a backup first.

The Employee Information Setup Cycle

Before you can enter any employee information and commence the preparation of your database it is necessary to set up the system to handle your company's unique requirements.

Although some of this preparation may be handled by MYOB in the course of their installation and training, it is necessary to have an overview so that you may be better equipped to successfully understand your system.

These procedures will be discussed in the order that they are usually performed.
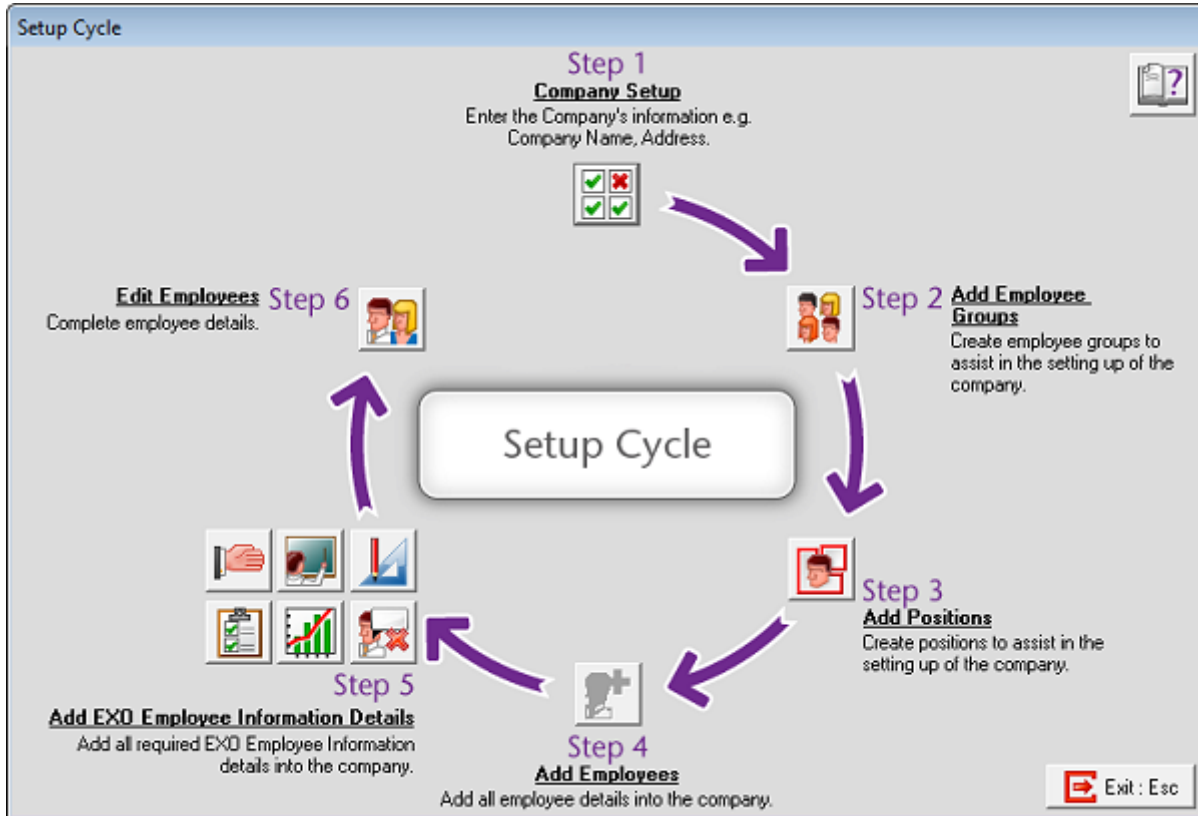
Click on each of the steps in turn to perform all of the necessary operations for setting up your company.

- Company Setup (see page 10)
- Add Employee Groups (see page 12)
- Add Positions (see page 14)
- Add Employees (see page 22)
- Add Employee Information Details (see page 60)
- Edit Employees (see page 63)

Step One - Company Setup

Select Step One from the Setup Cycle. The Company setup section identifies the company and its employee group structure.

Employer Details Enter the details of the company name, address, suburb, city, and the company's IRD Number.

Default employee order When scrolling through your employee masterfile or pay screens you can either scroll through in alphabetical or numeric staff code order. Click on the order you wish to use as your default.

User-Defined Click these buttons to set the name and caption of the two User Defined buttons that appear on the Other tab (see page 30) of the Employee Maintenance window. User-Defined information is free-form - it can be any type of information that you may want to keep.

Employee Group Structure

This determines the overall breakdown of Employee Group Codes (see page 12), their field sizes and number of sub-groups, which will be available when adding your employee groups masterfile. The employee groups structure is based on a number which can be made up of a maximum of 12 digits broken down into up to four separate levels.

The structure that you put in place here determines how the employee groups are set up. Operators that are familiar with the Cost Centre structure in MYOB Exo Payroll will see the similarities in this area.

In the screenshot above, the structure that is being used is as follows:

Area - 1 digit

Location - 1 digit

This means that Employee Group Codes will consist of two digits: the first indicates the group's area (e.g. 1 = Auckland, 2 = Wellington, 3 = Christchurch), and the second indicates its location (e.g. 1 = Admin, 2 = Sales, 3 = Warehouse). This would mean that a code of 12 would indicate the Auckland Sales group and the code for the Christchurch Administration group would be 31.

In most cases the employee group structure may reflect the department set up in the payroll.

The purpose of the employee group structure is to group employees together, so that when assigning training, skills, jobs and tasks you are able to assign these using your employee groups. The ideal is that the employees are grouped to reflect similar requirements e.g. a lot of the training requirements for the Administration department would be similar in skill and knowledge requirements etc. So it would make sense to group your administration team together.

Before setting up your employee groups have a look through the system to see where the employee groups are used i.e. the allocating of training etc to get an idea of how to set your structure up based on your requirements.

Step Two - Add Employee Groups

The structure for your employee groups is set up in Step One. In Step Two you set up employee group codes and descriptive names. If you have a relatively straightforward employee group requirement your structure would look similar to the screen shown below:

Select Step Two from the Employee Information Setup Cycle. A list of Employee Groups appears. Click **Add** to create a new group, or highlight an existing group and click **Select** to edit it.

Code Enter the identification code for the group. This code must match the Employee Group Structure set up on the Company Setup screen (see page 10).

Name Enter a name for the group.

Manager Name Enter the name of the manager in charge of the group

Email Enter the manager's email address.

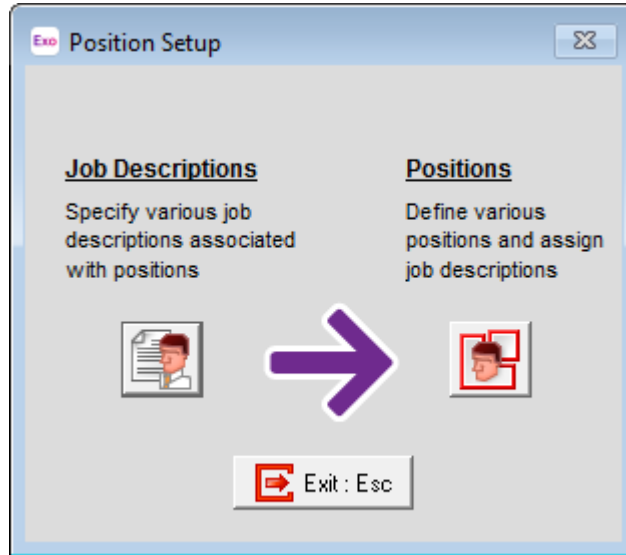**Phone** Enter the manager's contact phone number.

Employee Group Analysis

This area displays the breakdown of the **Code**, according to the Employee Group Structure set up on the Company Setup screen (see page 10).

Step Three - Add Positions

Select Step Three from the Setup Cycle to set up the positions that will be assigned to employees.

The setup process has two stages:

- Job Descriptions (see page 14)
- Positions (see page 15)

Once you have made additions and alterations to each window as necessary, click **Exit** or press ESC to return to the Setup Cycle.
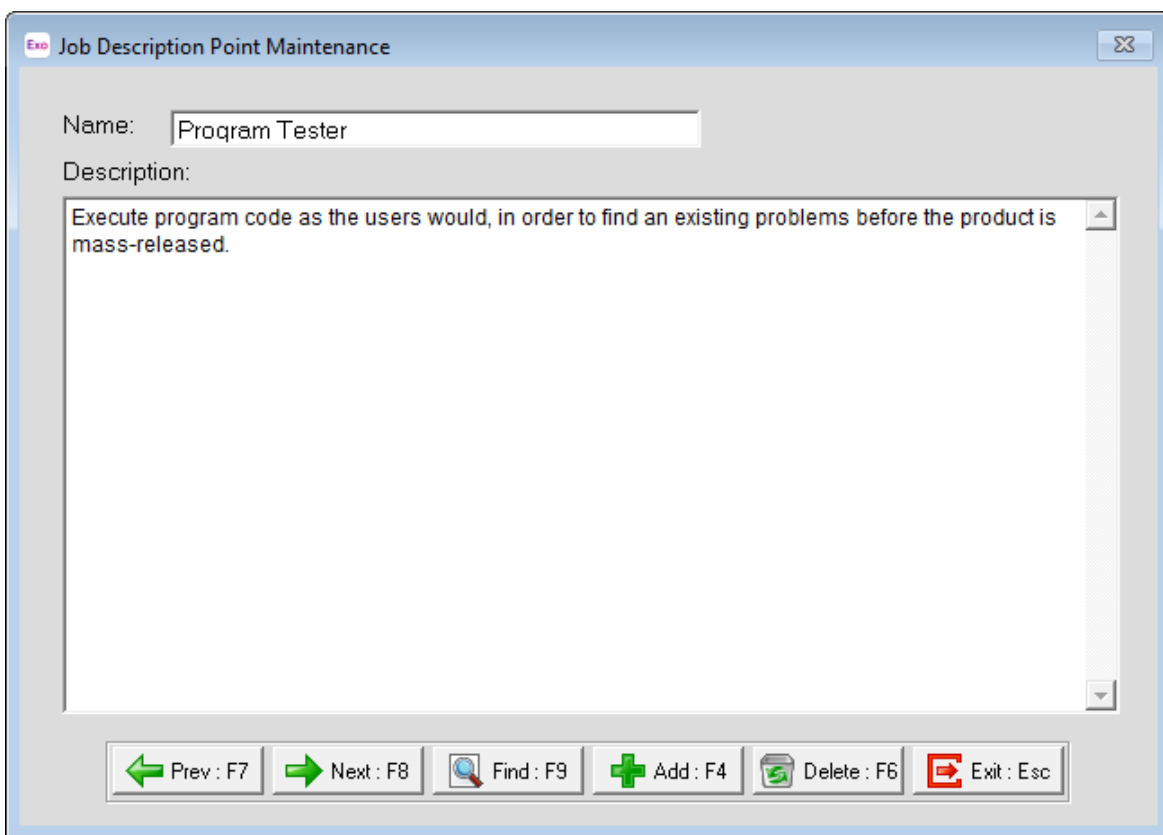
Adding Job Descriptions

The Job Descriptions section of the Position Setup window (see page 14) lets you describe the main types of activities carried out by employees.

The simplest scenario is where an employee might have one position and one job description; however, many employers seek people who are multi-talented and capable of taking on hybrid roles. Multiple job descriptions may combine together to form one position.

Creating Job Descriptions

Clicking the Job Descriptions button opens a list of all job descriptions. Click **Add** to create a new description, or highlight an existing description and click Select to edit it. Descriptions are added and edited on the Job Description Point Maintenance window:

Name Enter a name for the description.

Description Enter a description of what the job description entails. This can be as long or as short as necessary.

Once you have created your job Description Points you are then able to create your Positions (see page 15).

Adding Positions

Although it is important that all employees are assigned a position to make the system effective, the degree to which this area is used is completely dependent on your organisation's requirements. For example, some organisations may wish to use this area to a very low level, they may enter quite global options for positions such as Office Worker which would incorporate, receptionists, office Junior, Secretary etc. Other organizations will have more complex requirements for positions where they will use this area to enter more detailed Position Analysis.

The Positions section of the Position Setup window (see page 14) lets you set up and define the positions that employees will be assigned. Clicking the Positions button displays list of all positions. Click **Add** to create a new position, or highlight an existing position and click **Select** to edit it.

> **TIP:** The Maintenance menu, which provides access to Position maintenance, can also be accessed at any time by pressing F2.

This window contains six tabs:

- Details (see page 16)
- Skill/Trainings (see page 17)
- Tasks/Duties (see page 17)
- Job Description (see page 18)
- Incumbents (see page 19)
- User Defined (see page 20)

Details

This tab contains basic details about the position.

Position Enter a name for the position

Position Description Enter in the position description details. The information that is entered will be displayed in the job description. Ensure that the Job Description that you are preparing is as clear and effective as possible.

Position Requirements This is not a required field, but may be used to enter additional information such as personality traits needed for the position, e.g. "organised", past industry experience, etc.

Skills/Training

This tab is where you are able to assign skills (see page 78) and training (see page 85) to a particular position.
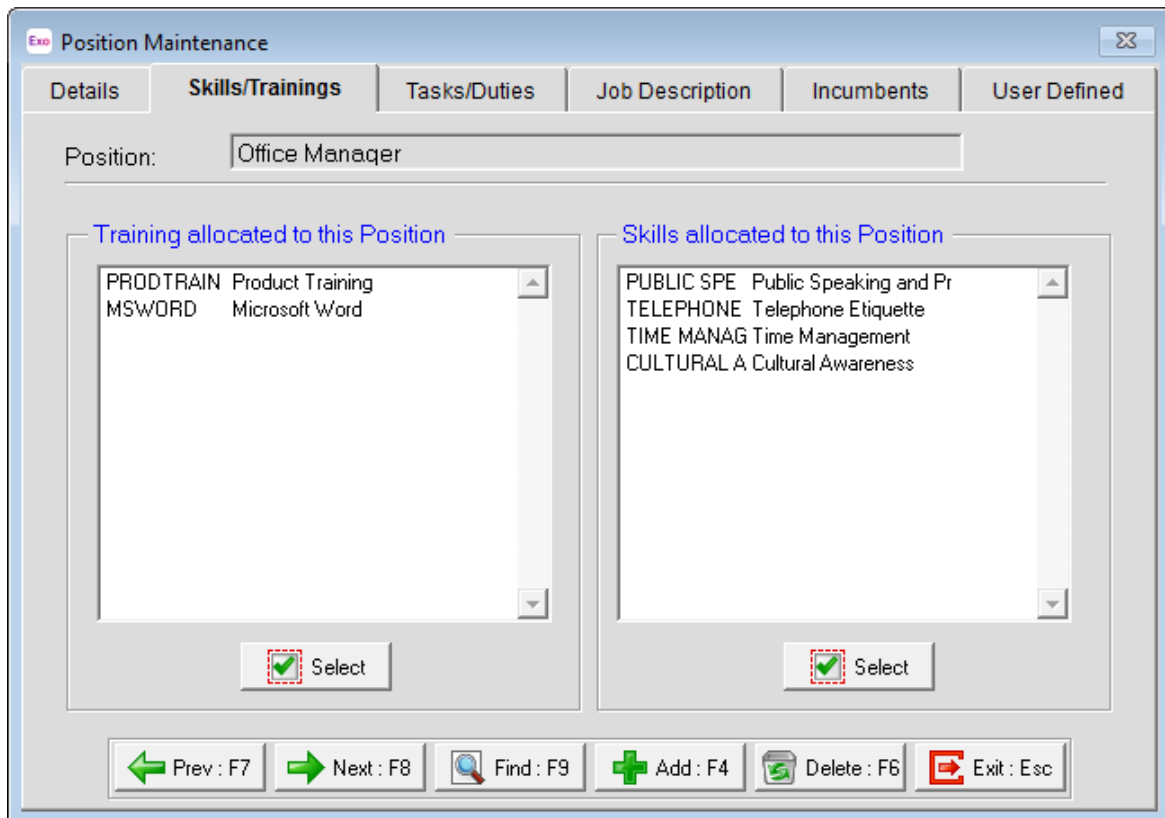
To assign skills and/or training, click on the **Select** button in the appropriate area, which displays the skills and/or training that you have created. These areas are not compulsory but are recommended to ensure that your system is effective.

Tasks/Duties

This tab is similar to the Skills and Training tab, and is used to assign Tasks or Duties (see page 80) to the individual positions.
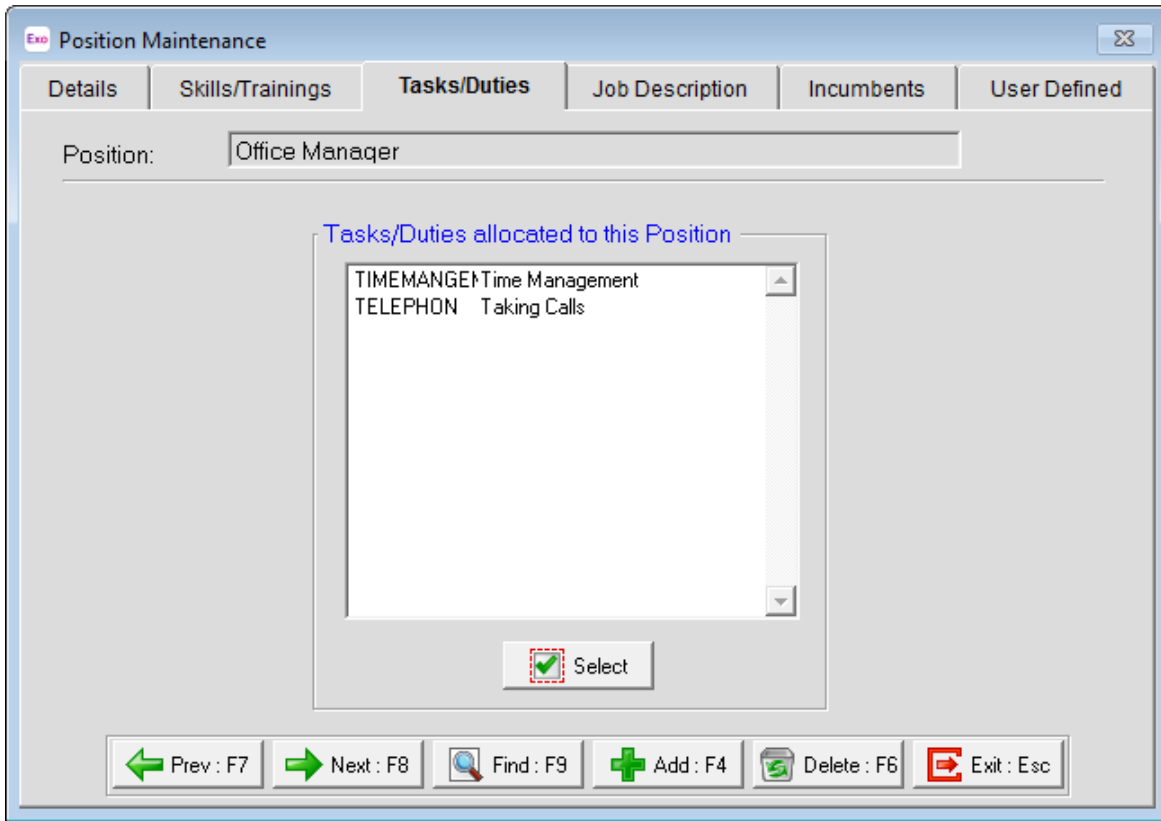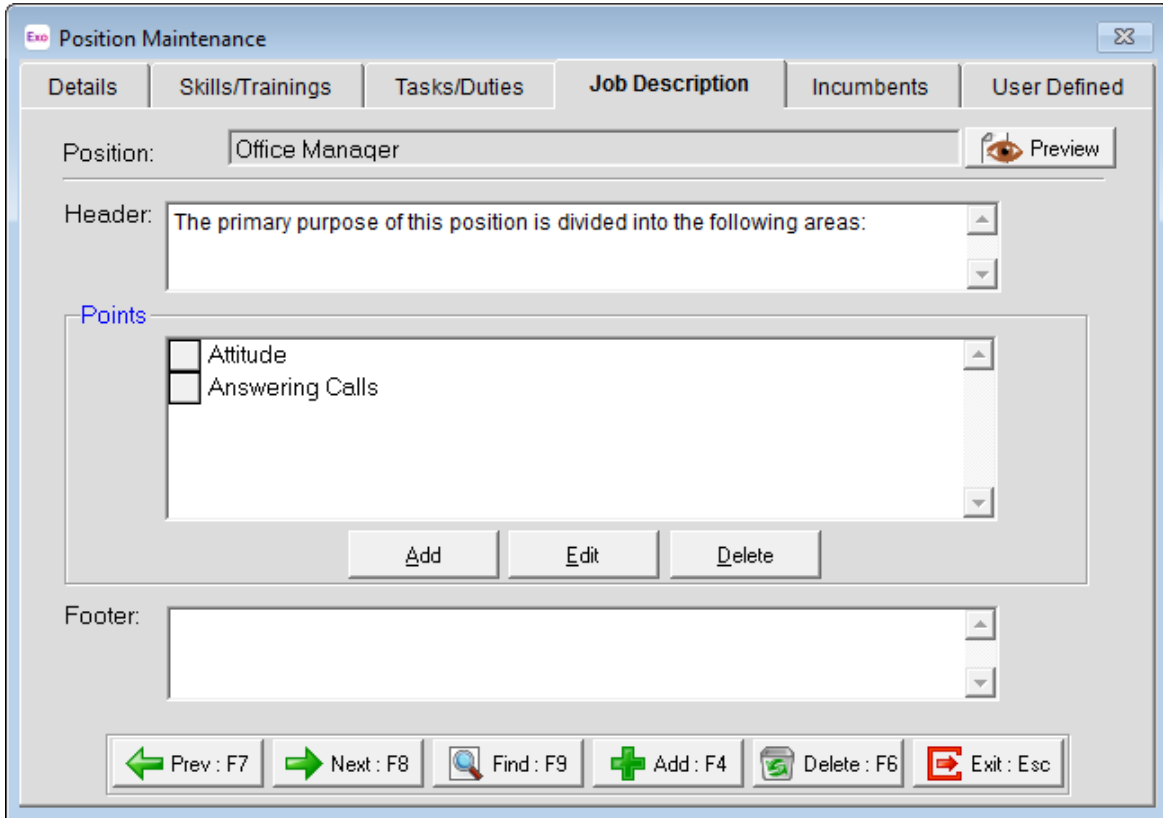

Click the **Select** button to display the list of tasks and duties you have created and assign them to the position.

MYOB EXO Employee Information

Job Description

Position

This tab lets you set up and print a Job Description for the position. You can preview and print the job description at any time by clicking the ![eye icon] button.

Header The information entered here will appear at the top of the Job Description you are creating.

Points This area lists the Job Description points (see page 14) assigned to this Job Description. Click the **Add** button to display a list of available Job Description points to assign.

Footer The information entered in this field will be shown at the foot of the Job Description document for this position.

Incumbents

This tab lists all employees who have currently hold this position.
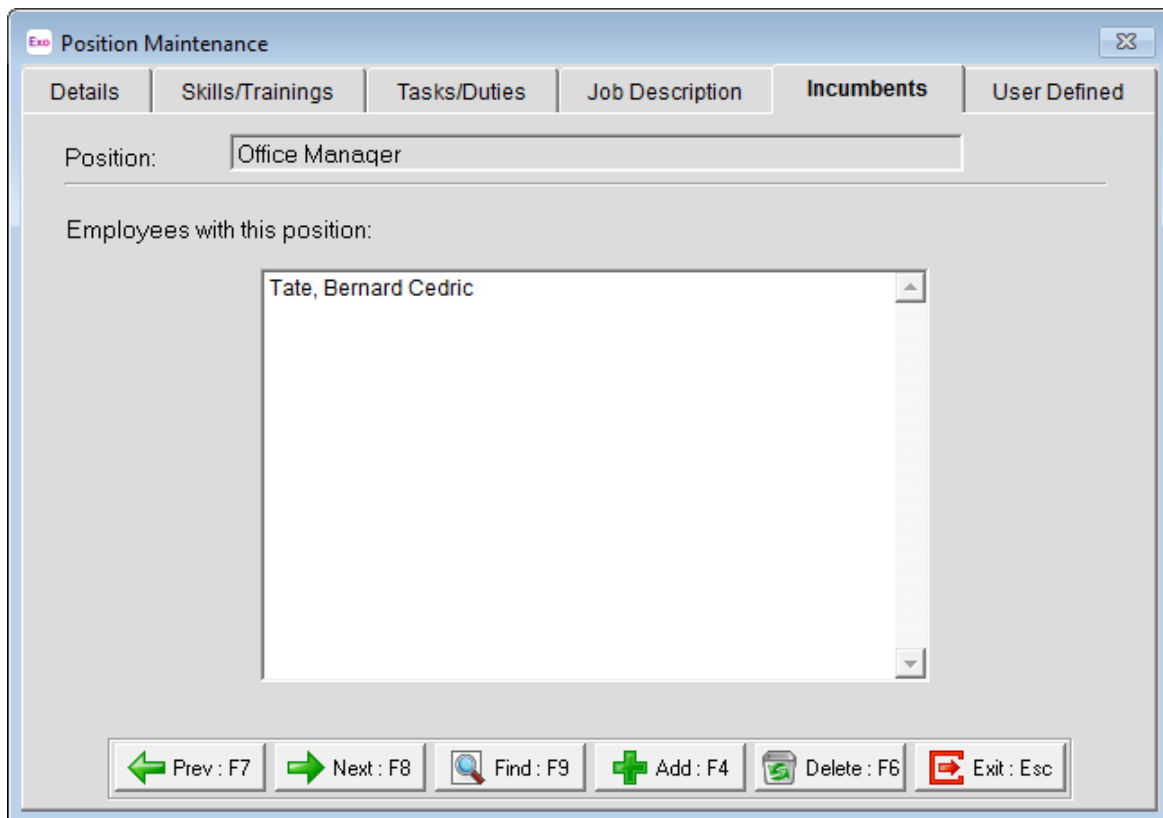
Employees with this position A list of the incumbents is displayed once the position has been assigned to one or more employees.

User Defined

This tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information which may not have been included in the set screens provided with the system.
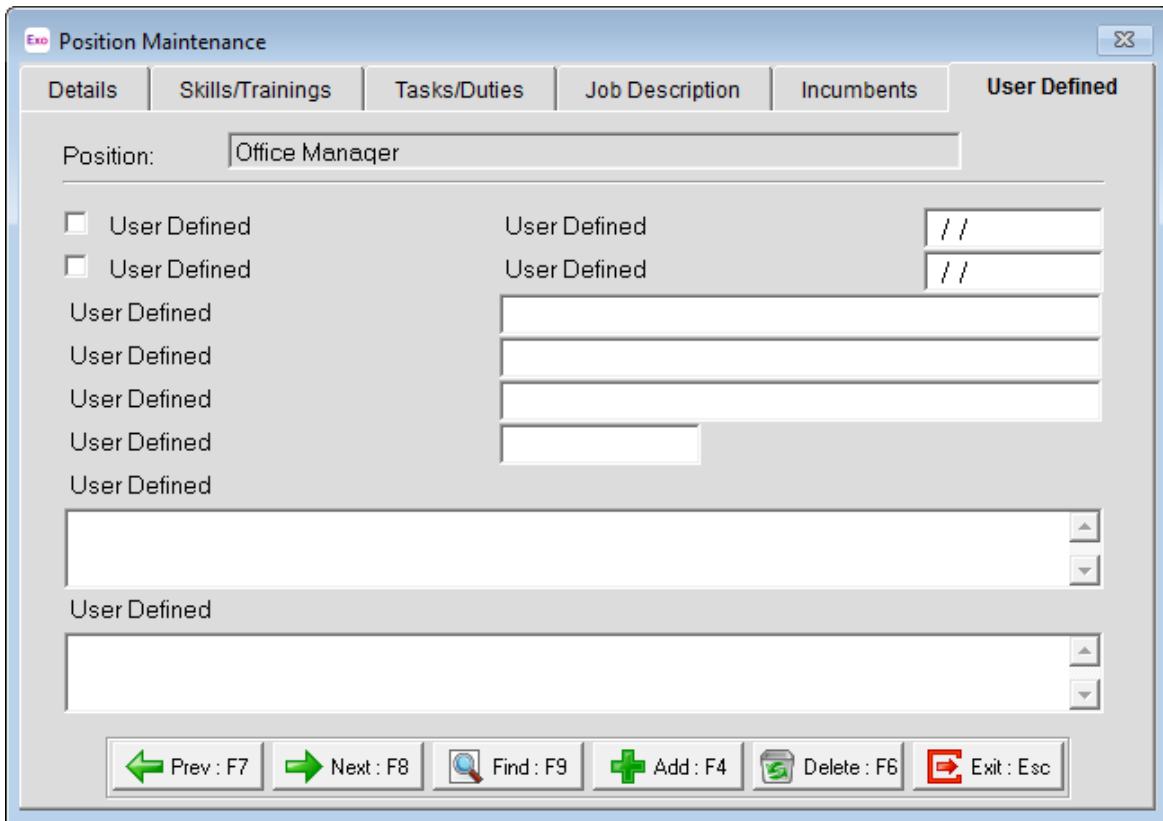
With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- Logical - Place a tick in the box to turn on a logical field.
- Date - Enter a date in the format dd/mm/yyyy.
- Text - Enter a short comment here.
- Memo - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

> **NOTE:** The names you enter for the User Defined fields apply to all positions, but the information you enter for the fields' values is specific to the plan you are currently editing.

Step Four - Add Employees

You may add employees at any time. You can add all of your employees into the system at this point, or you may choose to only add employee when they have had accidents. How employees are added depends on whether or not MYOB Exo Employee Information is installed standalone or integrated with MYOB Exo Payroll.

Standalone System (Exo Employee Information only)

Employees are added from the Setup Cycle. You will need contact phone numbers and addresses, emergency contact details, and IRD numbers.

Select Step Four of the Setup Cycle. The following window appears:

- To add a new employee, enter the Employee Code number and click **Add**.

- To convert an existing candidate to an employee, click the **Candidate** button. A picklist of candidates appears; double-click on the candiate that you want to convert to an employee.

In either case, the Employee Maintenance window (see page 22) opens, where you can enter details for the new employee. When adding a new employee, only the Employee Details tab (see page 22) is available to begin with. Once all required information is entered on this tab, the other tabs become available.

> **NOTE:** When converting a candidate to an employee, a new employee record is created, but the original candidate record is not deleted. It can be deleted manually, or you can keep it as a historical record.

Integrated System (Exo Payroll & Exo Employee Information)

Employees are not added in MYOB Exo Employee Information. When you add your employee into MYOB Exo Payroll, the employee is automatically brought across with the same employee code into Exo Employee Information. See the Exo Payroll documentation for information on how to add employees.

> **NOTE:** In an integrated system, candidates are converted to employees in Exo Payroll - if any candidates have been added, a **Candidates** button is available on the Add Employee window in Exo Payroll.

Employee Details

When adding a new employee, only the Employee Details tab that is available initially. This is deliberate, as there are compulsory details required on this tab before you can continue. If you are opening/editing an existing employee, all tabs are immediately available.

The Employee Details tab contains the following details:

Required Information

The details in this section must be completed before the other tabs on the Employee Maintenance window become available.

Code The unique numerical code that identifies the employee.

Title Select employee's title from drop down selection box.

Surname Enter employee's surname.

First Name Enter employee's first name(s).

Alpha Code For sorting and listing employees the system uses the first eight letters of the employee's surname as a sort code. This is shown here automatically. This alpha code must be unique. This alpha code must be unique. If a message appears that says "Alpha Code cannot be empty and must be unique" or "invalid input", it means that this Alpha Code is already in use, probably for an employee with the same surname. To correct this, change the Alpha Code to something else, e.g. by making the last character of the Alpha Code the employee's first initial.

Start Date Enter the employee's start date. The employee's years of service are displayed next to the start date. This value is calculated as the system date minus the Start Date.

Employee Group Specify the Employee Group (see page 12) that this employee belongs to.

Position Specify the Position (see page 15) that this employee holds.

Personal Details

These are all self-explanatory. If the Birth date is entered in MYOB Exo Payroll, it will be displayed in this field. The Gender will also come through from the Exo Payroll.

Next to some fields you will see a […] button; this indicates that you have the ability to add pre-set selections, depending on your organization's specific requirements.

If the system is integrated with the Health and Safety module, the following information is automatically inserted:

- Country of Birth
- Ethnicity
- Home Language

Employment Information

Occupation The employee's occupation, as taken from MYOB Exo Payroll. This is not necessarily the same as the employee's Position. If the system is operated as a standalone system, there is no need to enter the Occupation.

Pay Frequency Select the pay frequency this employee belongs to

IRD Number Enter the employee's IRD number. The system will validate the number entered as being a valid IRD number.

Tax Code Enter the employee's tax code. Note that some tax codes are not accessible unless a valid IRD number has been entered.

SLCIR / SLBOR If the employee has a Student Loan tax code (i.e. one that ends in "SL"), these fields becomes available. They specify any additional Student Loan repayments that may have been set up for the employee.

Full / Part Time Select an appropriate employment status from the following list: Full-Time, Part-Time.

Salary / Wage Select an appropriate form of remuneration from the following list: Salary, Wage.

Permanent / Casual Select an appropriate employment status from the following list: Permanent, Casual.

Photo

You can insert an employee's photo if your organisation requires this. Click the **Insert Photo** button and select the image file. Only bitmap (.BMP) files are supported.

To remove the employee's photo, click **Clear**.

Contact Details

The Contact Details tab of the Employee Maintenance window holds contact details for the employee. The employee's contact details are added from MYOB Exo Payroll if the system is being operated as an integrated system. However you will need to enter the additional information such as the employees cell phone and email address if applicable.

Enter the following details into the relevant fields:

Employee Contact Details

Enter the following address details for the employee:

- Postal Address
- Postal Suburb
- Postal City
- Phone number
- Mobile phone number
- Internal telephone extension
- Email address
- Home Address
- Home Suburb
- Home City

Emergency Contact

Enter the following details for the employee's emergency contact person:

- Name
- Address
- Suburb
- City
- Phone number

Supervisor Details

Enter the following details for the employee's supervisor:

- Name
- Email address
- Phone number

User Defined

The User Defined tab of the Employee Maintenance window contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

MYOB EXO Employee Information

The following types of User Defined Field are available:

- Logical - Place a tick in the box to turn on a logical field.
- Date - Enter a date in the format dd/mm/yyyy.
- Text - Enter a short comment here.
- Memo - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

> **NOTE:** The names you enter for the User Defined fields apply to all employees, but the information you enter for the fields' values is specific to the employee you are currently editing. For example, if you change one of the text fields to "Middle Name", then this field will be called "Middle Name" for all employees; however, the actual contents of the field are entered separately for each employee.

Documents

The Documents tab of the Employee Maintenance window lets you keep a copy of all records relating to the employee.
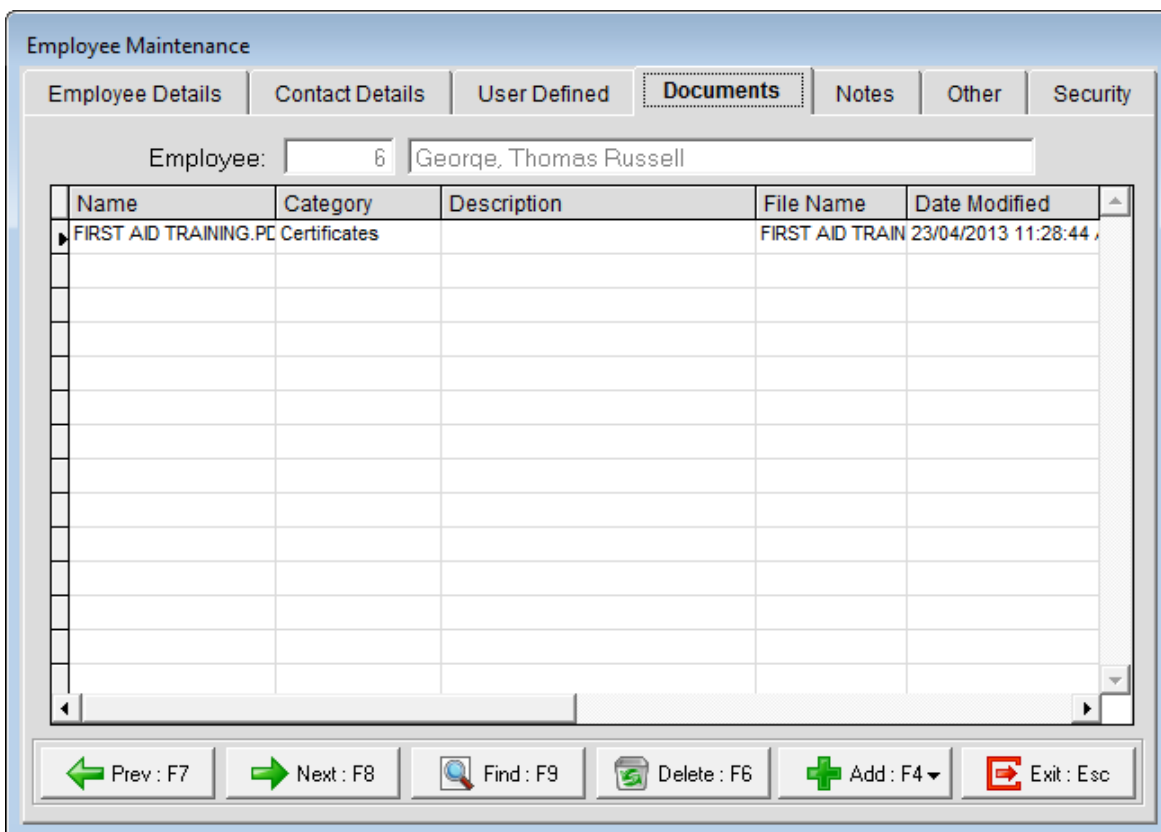
Click one of the options in the **Add** dropdown button to add a new document for the employee. You can:

- Attach an existing document file (see page 91).

- Create a new document (see page 91) using the built-in word processing interface. You can create a new blank document, or create a document that is based on a Document Template (see page 95).

Double-click on an existing document to open it. If the document is an attached file, it will open in the default editor for the type of file; if it is a document created in Exo Employee Information, it will open in the built-in word processing interface, where it can be edited.

Right-click on a document and select **Edit document properties** to edit the document's Name, Category and/or Description.

To remove a document from the employee's file, select it and click the **Delete** button.

Notes

The Notes tab of the Employee Maintenance window enables you to make or edit personnel notes on any employee.
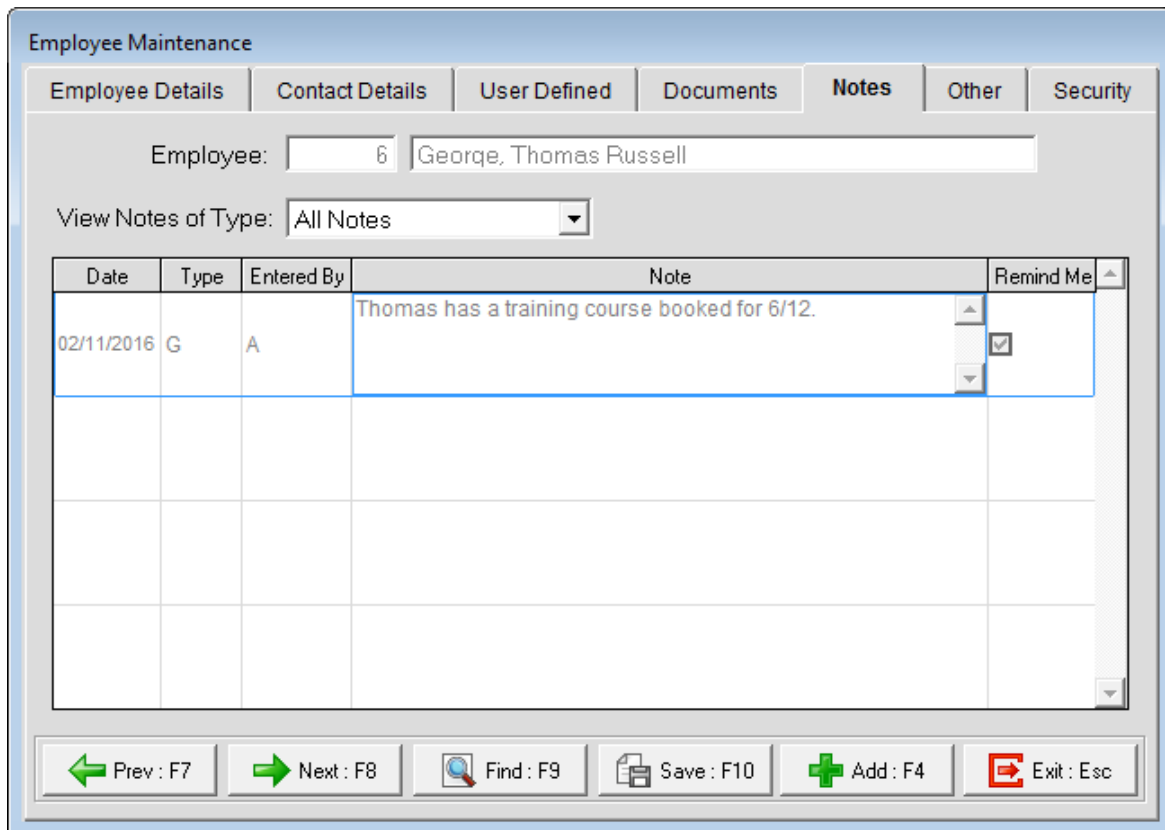
You can enter general Notes at any time. These notes can also be printed out in the Employees Note report at any time.

Notes can be entered or edited from the Notes tab of the Employee masterfile screen, by selecting Employee Notes from the File menu or by pressing F12 anywhere in the program.

Adding a Note

From the Notes Tab, click **Add** or press F4 to add a Note. The following screen appears.

Date This defaults to the current date. This would normally be left unchanged.

Entered By This field displays the User who entered the note originally.

Note Type Select one of the note types set up on the Note Types window (see page 73). In some cases a Default note will be automatically entered by the system, such as when an employee takes Sick Leave. These default notes can still be edited at a later stage.

Reminder Date Here you can enter a date to turn this note into a Reminder note. Reminder Notes pop up on the Show Reminders screen when you log in to Exo Employee Information. When the date is removed, the note will no longer appear as a reminder.

Recipients If this note is to be a Reminder Note, you should select one or more recipients of the note. Click the ⌐…⌐ button for a selection.

All users are listed on the left; all recipients of the reminder are listed on the right. You can click on users and drag them from one list to the other.

> Moves the selected user to the list of recipients.

>> Moves all users to the list of recipients.

< Moves the selected user from the list of recipients back to the main list.

<< Moves all users from the list of recipients back to the main list.

To edit an existing note, select the note and double-click it, or click **Edit**. This opens the same screen used to add notes, allowing you to edit the note's details.

Click **Save** or press F10 to save when you are finished editing.

Other

The Other tab of the Employee Maintenance window lets you edit the HR information for a specific employee.
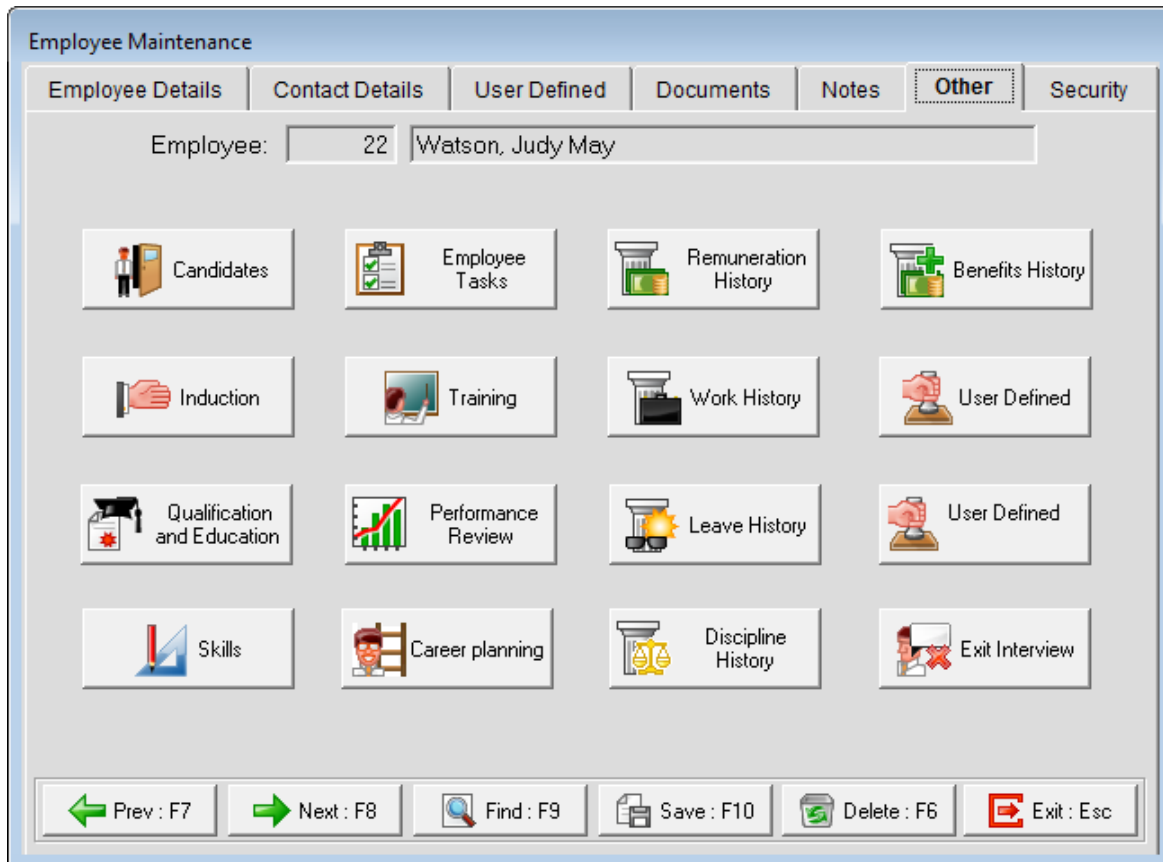
Click on a button to edit the relevant information. Buttons for the following areas are available:

- Candidates (see page 31)
- Induction (see page 31)
- Qualification & Education (see page 33)
- Skills (see page 35)
- Employee Tasks (see page 37)
- Training (see page 39)
- Performance Review (see page 41)
- Career Planning (see page 45)
- Remuneration History (see page 47)
- Work History (see page 49)
- Leave History (see page 51)
- Discipline History (see page 52)
- Benefits History (see page 54)
- Exit Interview (see page 56)

The two **User Defined** options are customised on the Company Setup window (see page 10).

> **NOTE:** Leave History and Remuneration History will come through from the payroll for those organizations operating the system integrated with MYOB Exo Payroll. For organizations operating the system standalone, information can be inserted directly into these screens.

Candidate

If the employee was formerly a candidate, you can view the information logged against that person when they were a candidate by clicking the **Candidate** button on the Other tab of the Employee Maintenance window (see page 30).

Candidates are created on the Candidate Maintenance (see page 65) window.

Candidates are converted to employees as part of the Add Employees (see page 22) function.

Induction

Induction Plans (see page 72) are assigned to an employee by clicking the **Induction** button on the Other tab of the Employee Maintenance window (see page 30).

Clicking this button displays a list of the plans already assigned to the employee; initially this list will be empty.
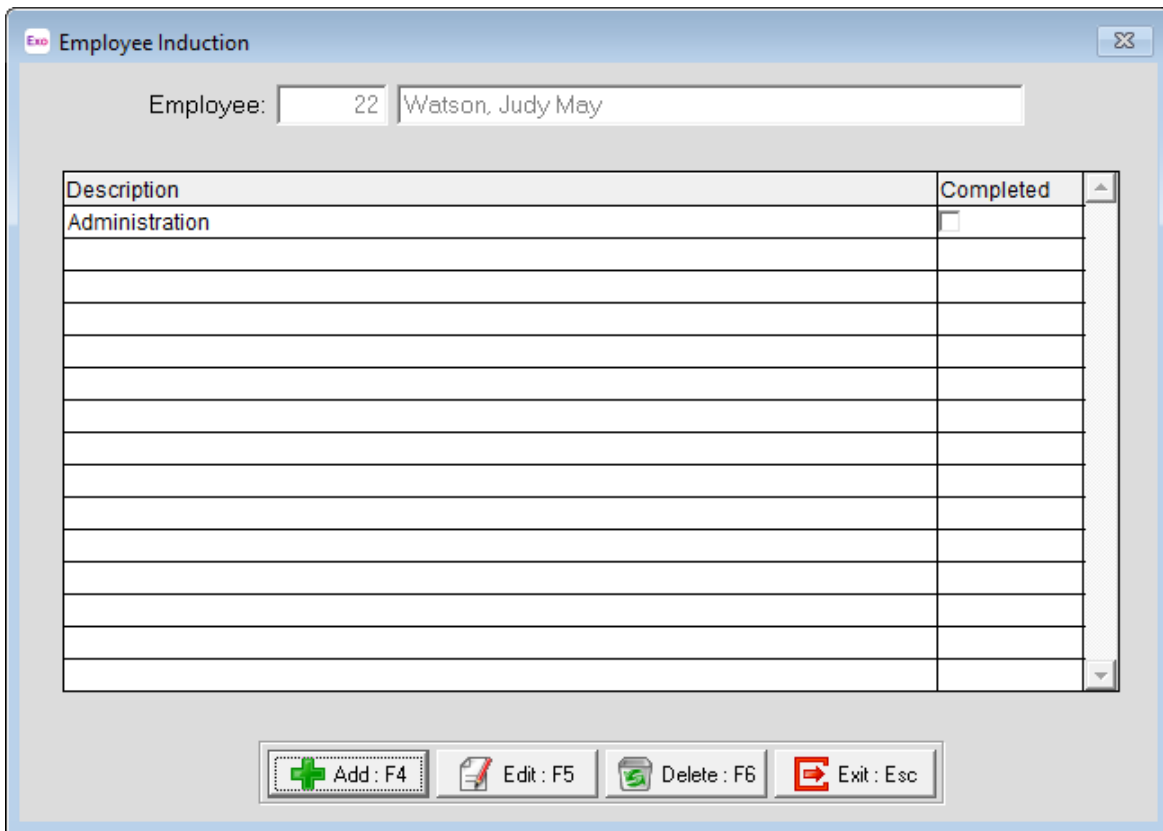
Click the **Add** button to display a list of all available Induction Plans. Highlight a plan that is suited to the employee's requirement and click **Select**. This will take you to the following window:

In this window you will see the points (steps) displayed. Tick the box in the Done column once each step is completed. This will automatically insert the date that the job was ticked as being completed. If you require the date to be changed you can override it.

To enter details for a point, double-click on it and you will be taken to a window that contains a text box for entering additional information. You also have the ability to enter in a reminder date relating to this, which would result in a reminder being displayed on entry into the system and thereafter until the step was signed off as being completed.

Click the [button icon] button to preview and print out a copy of the Induction Plan.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the induction plan.

Qualification & Education

The recording of employee's qualifications can prove to be valuable when working with employees in developing their roles. For those companies that have a succession planning requirement, will also find this area extremely helpful.

By creating a database of qualification options and then assigning these at the employee level this can become an easily managed area providing valuable information to assist in your organisation's human resource planning.

Access the record of an employee's qualifications by clicking the **Qualification & Education** button on the Other tab of the Employee Maintenance window (see page 30).

Clicking this button displays a list of the qualifications already recorded for the employee; initially this list will be empty.

Click **Add** to create a new qualification, or select an existing qualification and click **Edit** to change its details. Qualifications are added and edited on the following window:

Qualification Name Enter in the name of the Qualification.

Type Select the type of qualification. Click the button to open a window listing all types, where new types can be added. You are also able to edit or delete any of the existing qualification types.

Date Attained Enter the date attained if applicable; if the qualification has not been attained at the time of entering the information leave the field empty.

Institution Enter the name of the institution that the employee attended or is attending.

Course Details Enter the details of the course.

Course/Paper Enter the course or paper that this relates to, if applicable.

Comments Enter any additional information that may be applicable.

Reminder You are able to enter in a date that you wish to receive a reminder relating to this qualification. It may be an agreed date that you will get back to the employee to see how things are progressing.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.
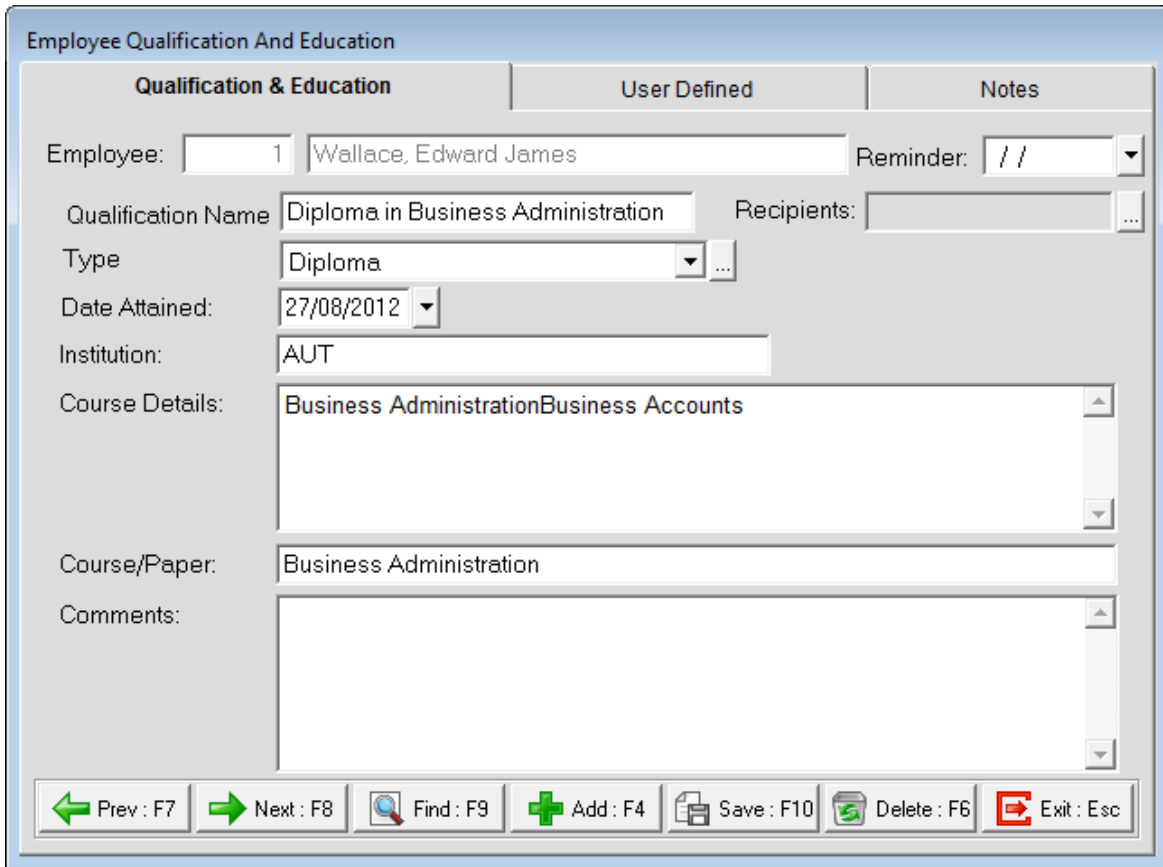
With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

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The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.
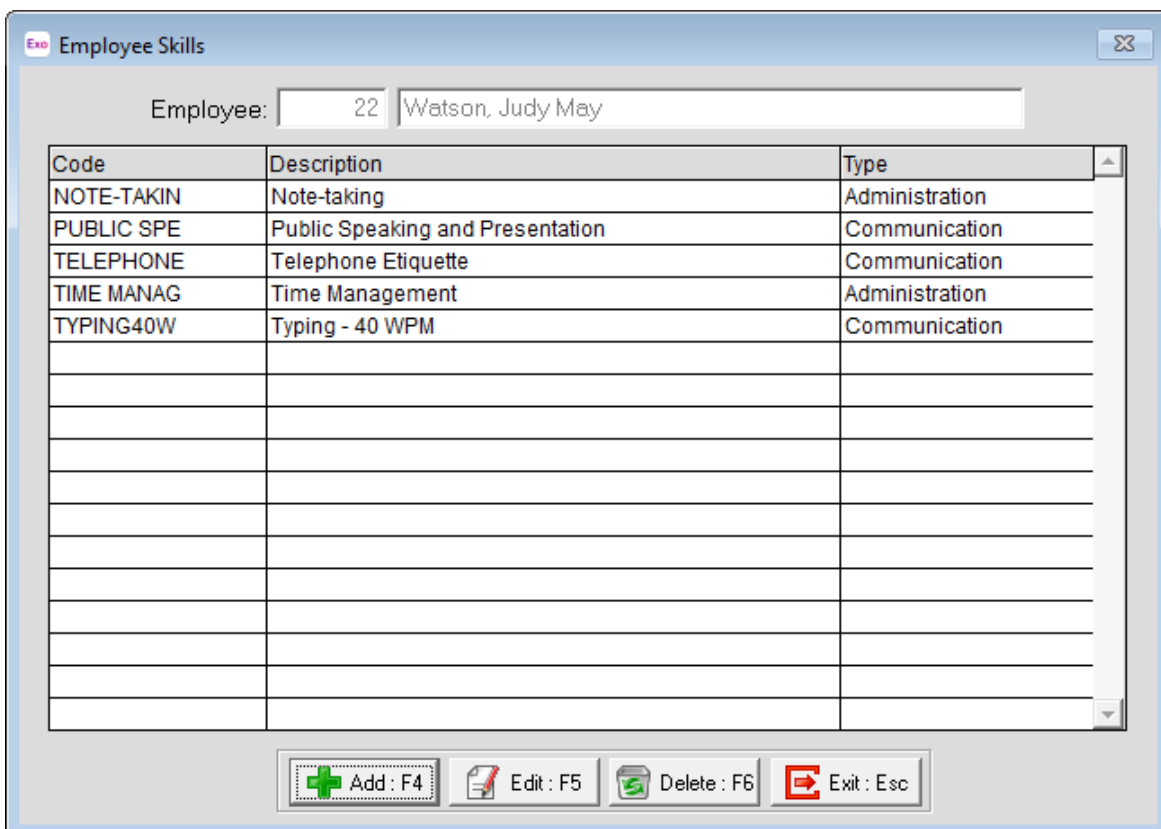
Notes

This tab stores notes and reminders for actions relating to the qualification.

Skills

Although you can assign Skills (see page 78) to an Employee Group (see page 12) or Position (see page 15), there may be occasions where you are required to assign a skill to an individual employee, e.g. if an employee has an existing skill that is not necessarily a requirement for their current position, and this should be kept in mind for future positions that become available requiring that skill.

Access the record of an employee's skills by clicking the **Skills** button on the Other tab of the Employee Maintenance window (see page 30).
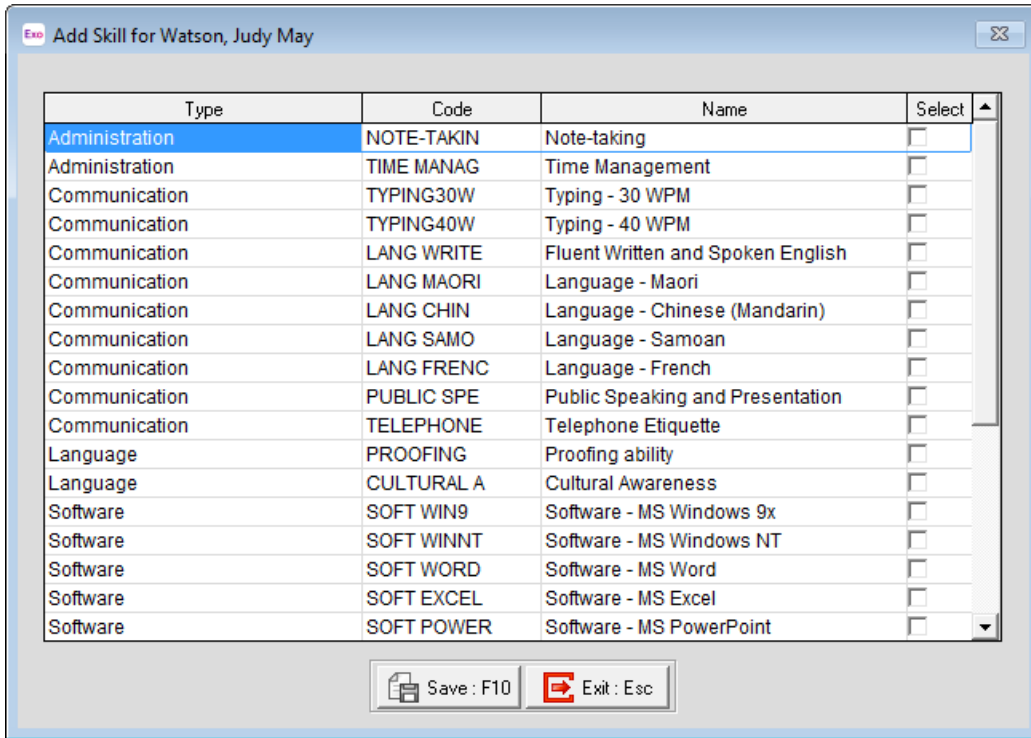
To add skills, click the **Add** button to display a list of all available skills:

Tick the boxes for all skills you want to add and click **Save**. The skills are added to the list on the Employee Skills window.

To edit an existing skill, select the skill on the Employee Skills window and click the **Edit** button. This opens the following window:
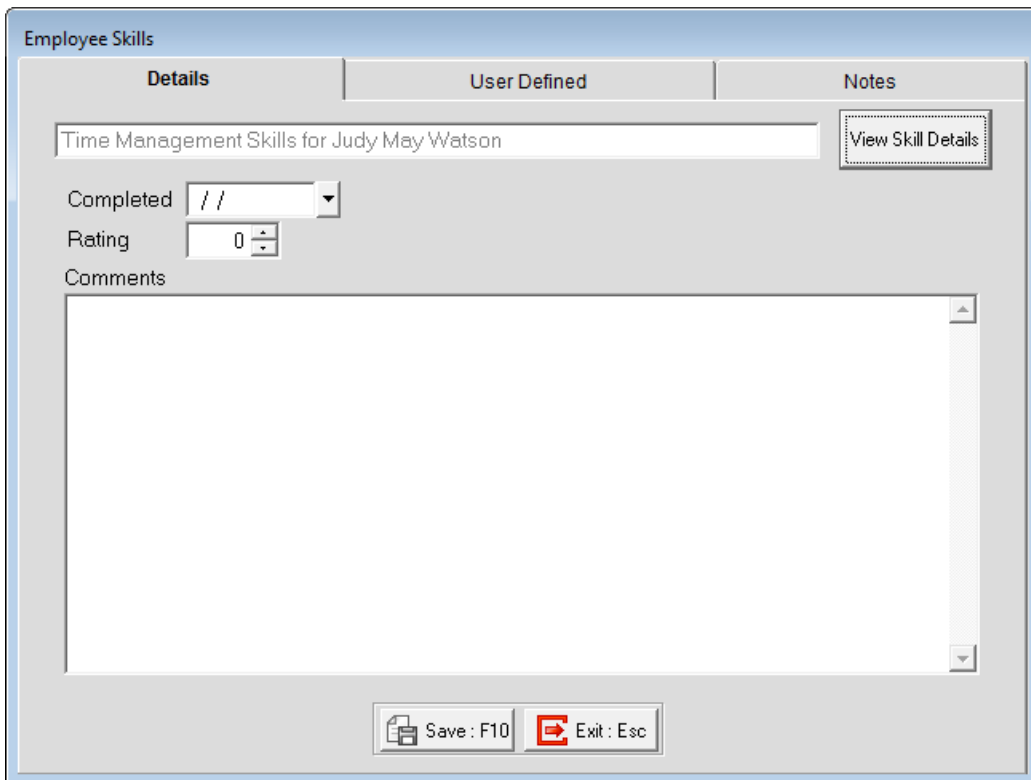
To view information on the skill itself, click **View Skill Details**. This displays the Skill Maintenance window (see page 78), with all properties read-only.

Completed Enter the date when this employee attained the skill.

Rating Some skills may be developed over time, and rated according to a grading system of some sort. You can alter an employee's grade here as they develop their skills.

Comments Enter any comments regarding the employee's attainment of, or proficiency in, this skill.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the skill.

Employee Tasks

Although you can assign Tasks or Duties (see page 80) to an Employee Group (see page 12) or Position (see page 15), there may be occasions where you are required to assign a task/duty to an individual employee.

Access the record of an employee's tasks/duties by clicking the **Employee Tasks** button on the Other tab of the Employee Maintenance window (see page 30).
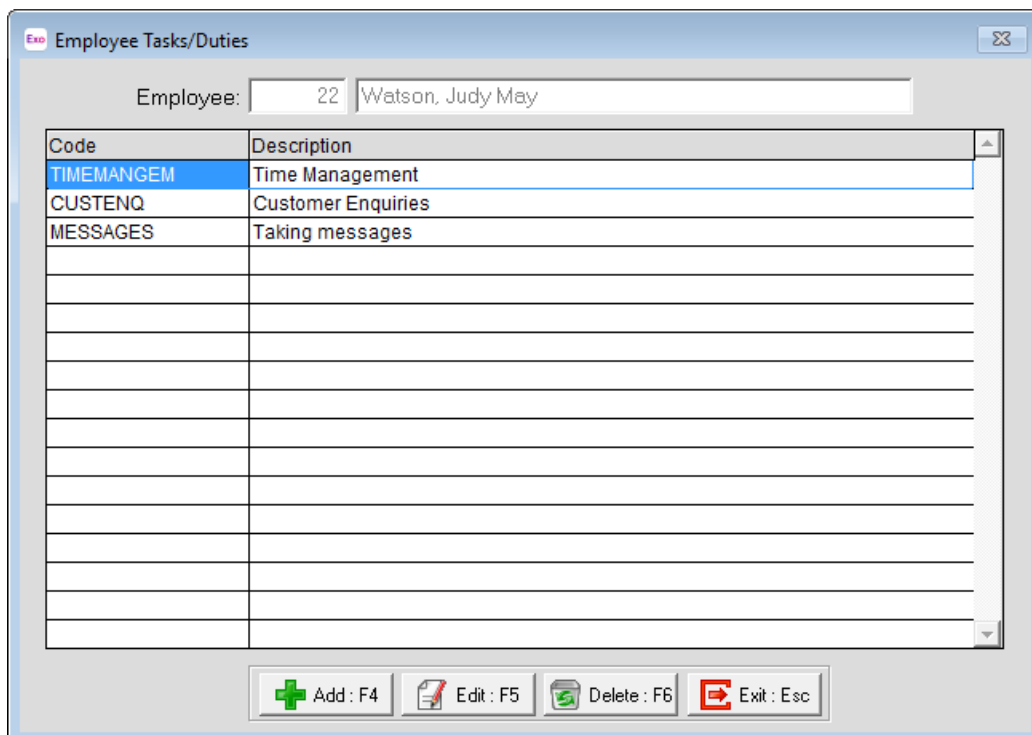
To add tasks/duties, click the **Add** button to display a list of all available tasks/duties:
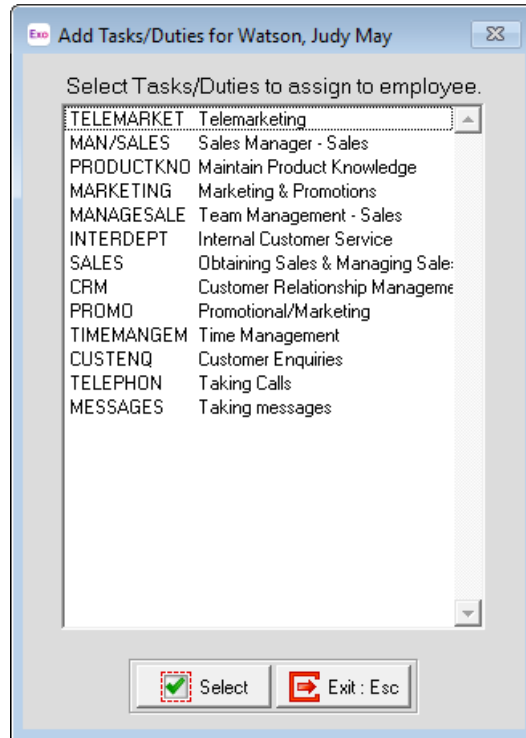
Highlight a task/duty and click **Select** to add it to the Employee Tasks/Duties window.

To edit an existing task/duty, select the task/duty on the Employee Tasks/Duties window and click the **Edit** button. This opens the following window:

To view information on the task/duty itself, click **View Task/Duty**. This displays the Task Duty Maintenance window (see page 80), with all properties read-only.

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Key Performance Indicators Describe any Key Performance Indicators (KPIs) that relate to the task/duty.

Comments Enter any comments relating to the task/duty as it applies to the employee.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the task.

Training

Although you can assign Training Courses (see page 85) to an Employee Group (see page 12) or Position (see page 15), there may be occasions where you are required to assign a course to an individual employee.

Access the record of an employee's training courses by clicking the **Training** button on the Other tab of the Employee Maintenance window (see page 30).

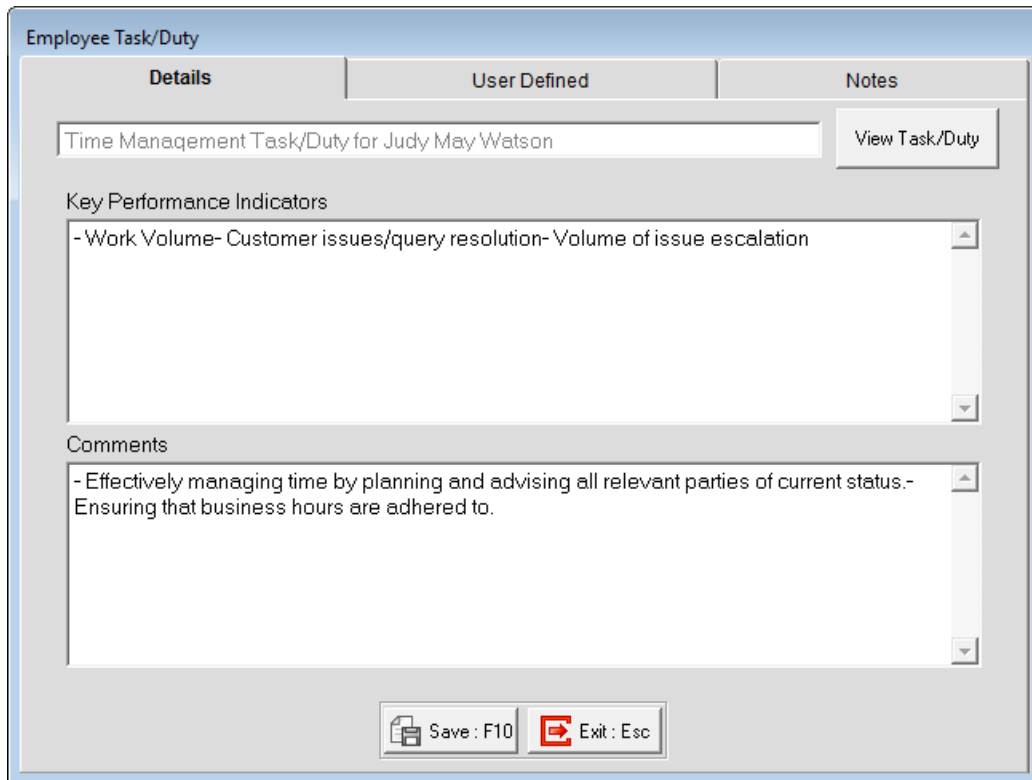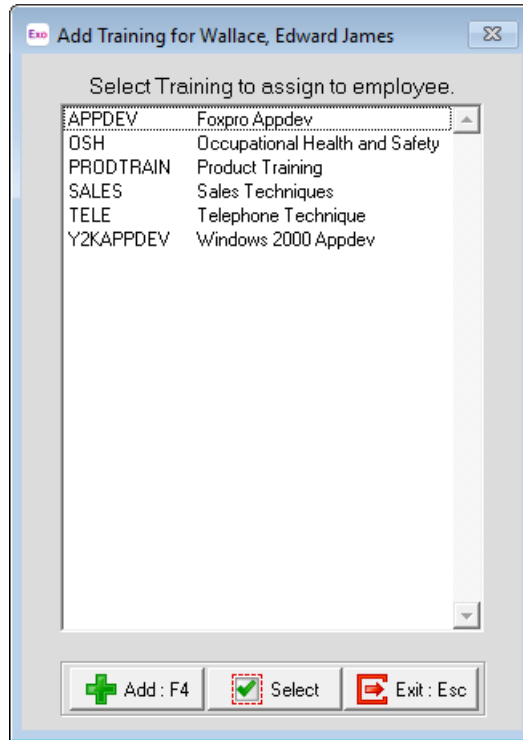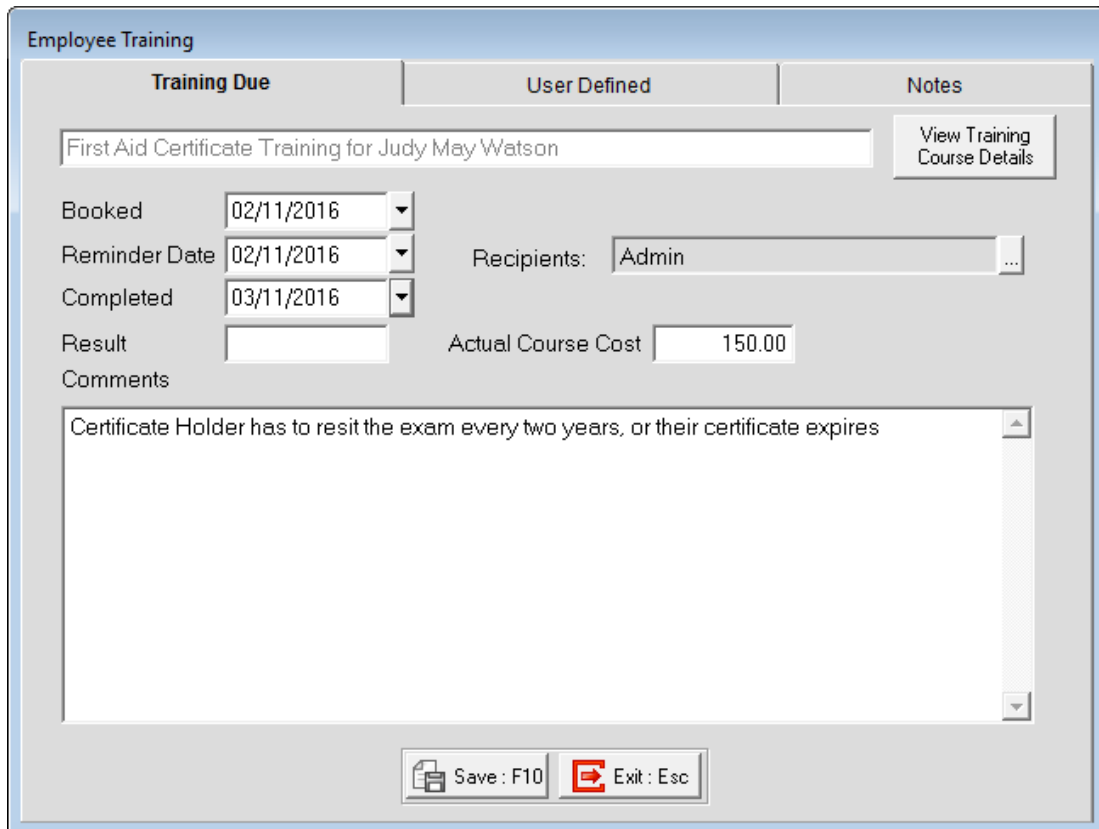To add training, click the **Add** button to display a list of all available training courses:

Highlight a training course and click **Select** to add it to the Employee Training window.

To edit an existing course, select the course on the Employee Training window and click the **Edit** button. This opens the following window:

To view information on the training course itself, click **View Training Course**. This displays the Training Courses Maintenance window (see page 85), with all properties read-only.

Booked Enter the date that the course is/was booked for.

Reminder Date To set up a reminder for when the training course is due to take place, enter a reminder date and specify recipients.

Completed Enter that date that the course was completed on.

Result Enter the result of the training course, e.g. "complete".

Actual Course Cost Enter the actual cost of the course, as opposed to the course value entered at on the Training Courses Maintenance window (see page 85). This can cover circumstances where you get a group discount or if you need to account for accommodation or travel costs.

Comments Enter any comments relating to the training course as it applies to the employee.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the training course.

Performance Review

Performance Review Plans (see page 75) are assigned to an employee by clicking the **Performance Review** button on the Other tab of the Employee Maintenance window (see page 30).

Click the **Add** button to display a list of all available Performance Review Plans. Highlight a plan that is suited to the employee's requirement and click **Select** to add it to the Performance Review window.

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To edit an existing plan, select the plan on the Performance Review window and click the **Edit** button. This opens the following window:

In this window you will see the points (steps) displayed. Tick the box in the Done column once each step is completed. This will automatically insert the date that the job was ticked as being completed. If you require the date to be changed you can override it.

To enter details for a point, double-click on it and you will be taken to a window that contains a text box for entering additional information. You also have the ability to enter in a reminder date relating to this, which would result in a reminder being displayed on entry into the system and thereafter until the step was signed off as being completed.

Click the button to preview and print out a copy of the Performance Review Plan.

Reviewer Details

Enter the details of the person who will be conducting the performance review on this tab.

History

You can use this tab to enter a historical record of any comments that apply from one review to the next.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the performance review plan.

Career Planning

Access an employee's plan for career advancement by clicking the **Career Planning** button on the Other tab of the Employee Maintenance window (see page 30).

To add a career plan, click the **Add** button. To edit an existing plan, select the plan and click **Edit**. Plans are added and edited on the following window:
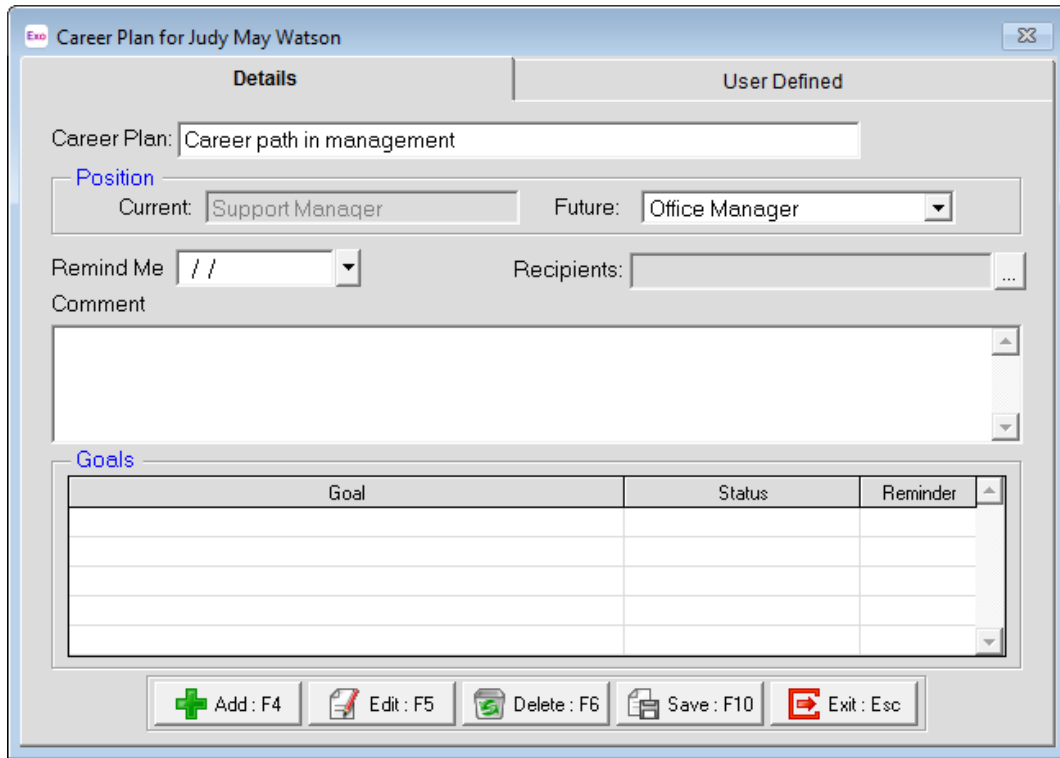
Position In the position box the current position the employee holds will be displayed. You are then able to select a future position the employee has expressed an interest in.

Remind Me You are able to enter in a date you wish to receive a reminder relating to this career plan. It may be an agreed date that you will get back to the employee to see how things are progressing.

Comment Enter any additional information if applicable.

Goals Add Career Plan Goals (see page 68) and enter any additional information. To add a new goal, click the **Add** button or press F4 to display a list of Career Plan Goals to select from.

Reminder You have the ability to enter a reminder date for each goal entered. This is particularly important if the Career plan is made up of several goals which may require individual monitoring during the duration of the Plan.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Remuneration History

MYOB Exo Employee Information keeps a log of changes to employees' salary or wages. Where it is integrated with MYOB Exo Payroll, the payroll automatically generates a note every time there is a change to an employee's salary or hourly rate. These notes are displayed in Employee Information, where new notes can be added.

Access an employee's remuneration history by clicking the **Remuneration History** button on the Other tab of the Employee Maintenance window (see page 30).

To add a remuneration note, click the **Add** button. To edit an existing note, select the plan and click **Edit**. Notes are added and edited on the following window:

Date Today's date is automatically entered.

Note Type Enter a Note Type (see page 73) for the note. If you do not know the code you require, press ENTER in this field to select a Note Type from a list.

Authorised By Enter the name of the person that authorised the change in remuneration.

Date From / To Enter the date(s) that the current wages/salary apply from/to.

Comments Enter any additional comments relating to the change in remuneration.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Work History

MYOB Exo Employee Information keeps track of any previous positions held by employees since being with the company. This is useful for obtaining a quick overview of the employee's progression. Any changes to the Position of an employee will automatically generate a note on this window, and new notes can be added.

> **Note:** It is important to remember that the **Occupation** displayed on the **Employee Details tab (see page 22)** of the Employee Maintenance window is not the same as the **Position** assigned in Employee Information.

Access an employee's work history by clicking the **Work History** button on the Other tab of the Employee Maintenance window (see page 30).
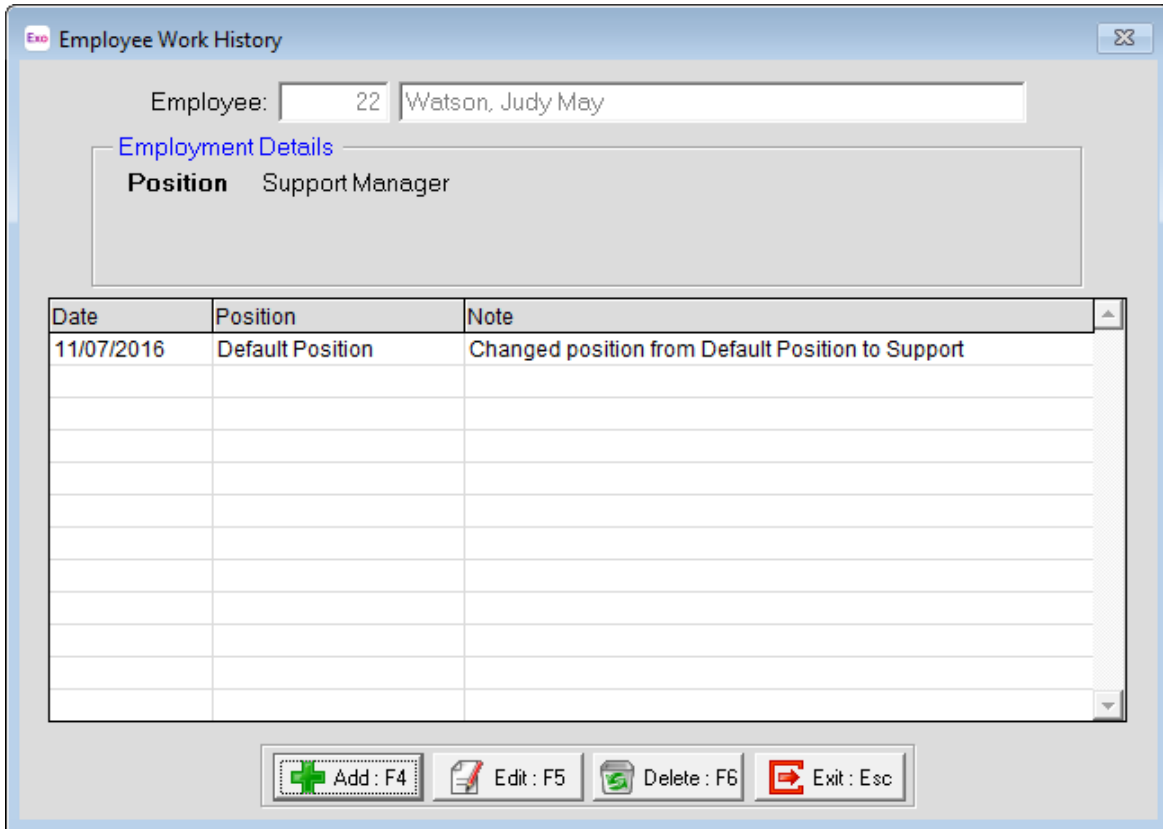
To add a work history note, click the **Add** button. To edit an existing note, select the plan and click **Edit**. Notes are added and edited on the following window:

Date Today's date is automatically entered.

Note Type Defaults to "Work History".

Authorised By Enter the name of the person that authorised the change in position.

Position Enter the new position.

Date From / To Enter the date(s) that the current position applies from/to.

Comments Enter any additional comments relating to the change in position.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Leave History

MYOB Exo Employee Information keeps a log of any leave taken by the employee. Where is integrated with MYOB Exo Payroll, the payroll automatically generates a note every time Holiday Pay, Sick Leave, etc. is paid out to the employee. These notes are displayed in Employee Information, where new notes can be added.

Access an employee's leave history by clicking the **Leave History** button on the Other tab of the Employee Maintenance window (see page 30).
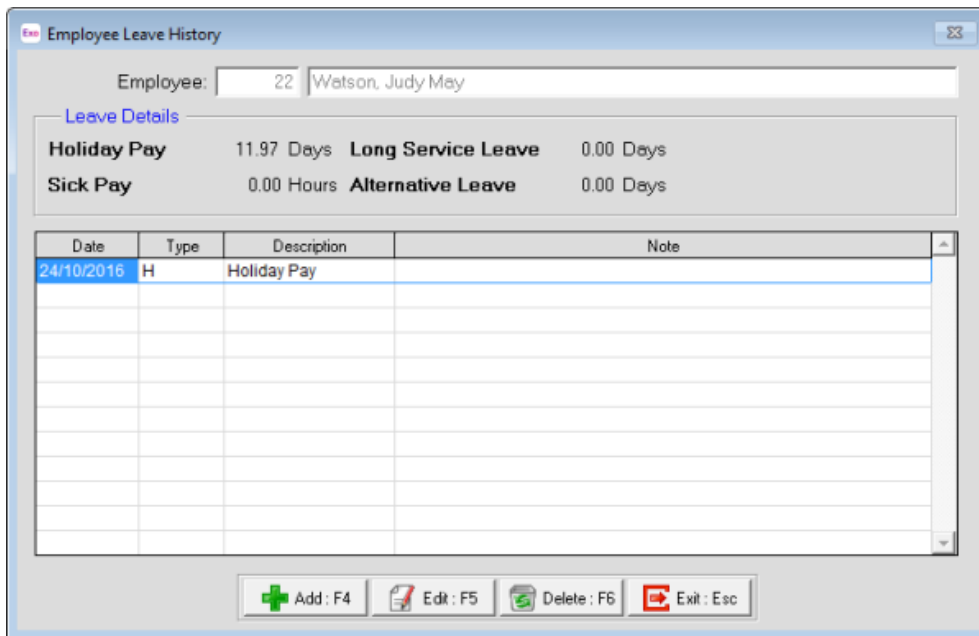
To add a leave history note, click the **Add** button. To edit an existing note, select the plan and click **Edit**. Notes are added and edited on the following window:
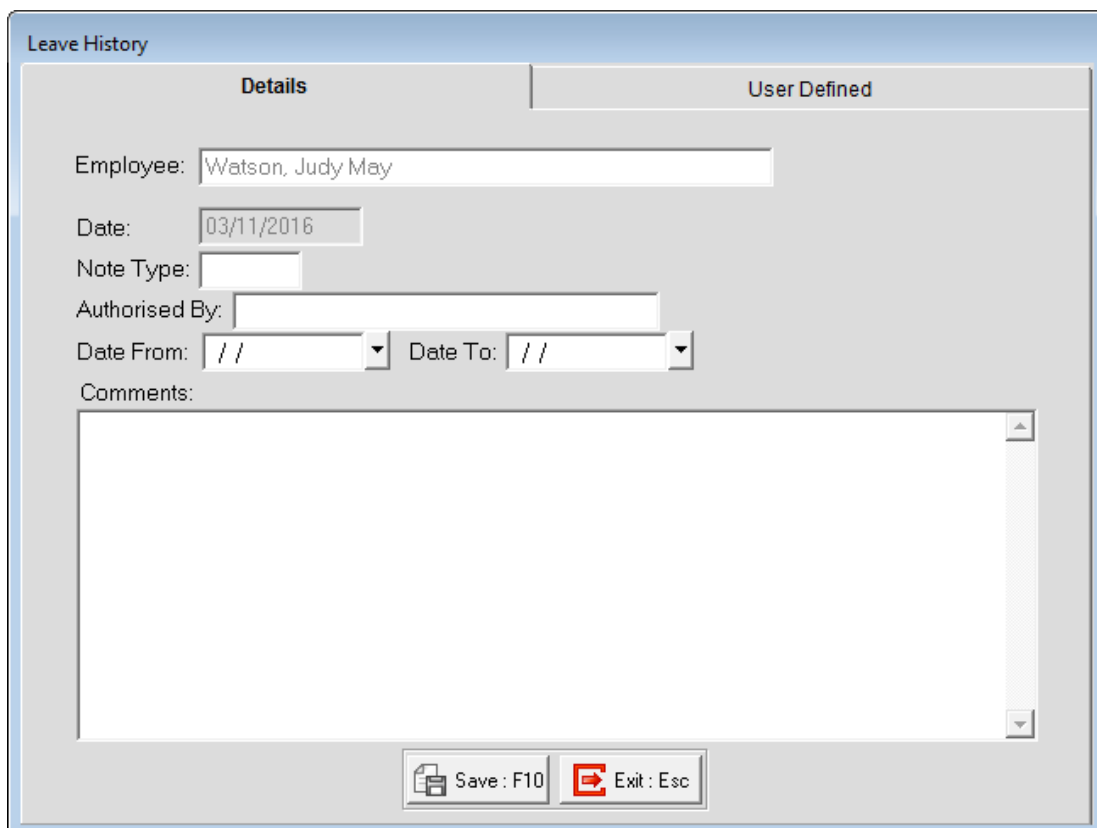
Date Today's date is automatically entered.

Note Type Enter a Note Type (see page 73) for the note. If you do not know the code you require, press ENTER in this field to select a Note Type from a list.

Authorised By Enter the name of the person that authorised the leave.

Date From / To Enter the date(s) that the leave applies from/to.

Comments Enter any additional comments relating to the leave.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Discipline History

Although it is the hope of all organizations that the need to discipline staff is rare if at all, it is important that if the occasion arises that the organisation records the information correctly.

Access an employee's discipline history by clicking the **Discipline History** button on the Other tab of the Employee Maintenance window (see page 30).
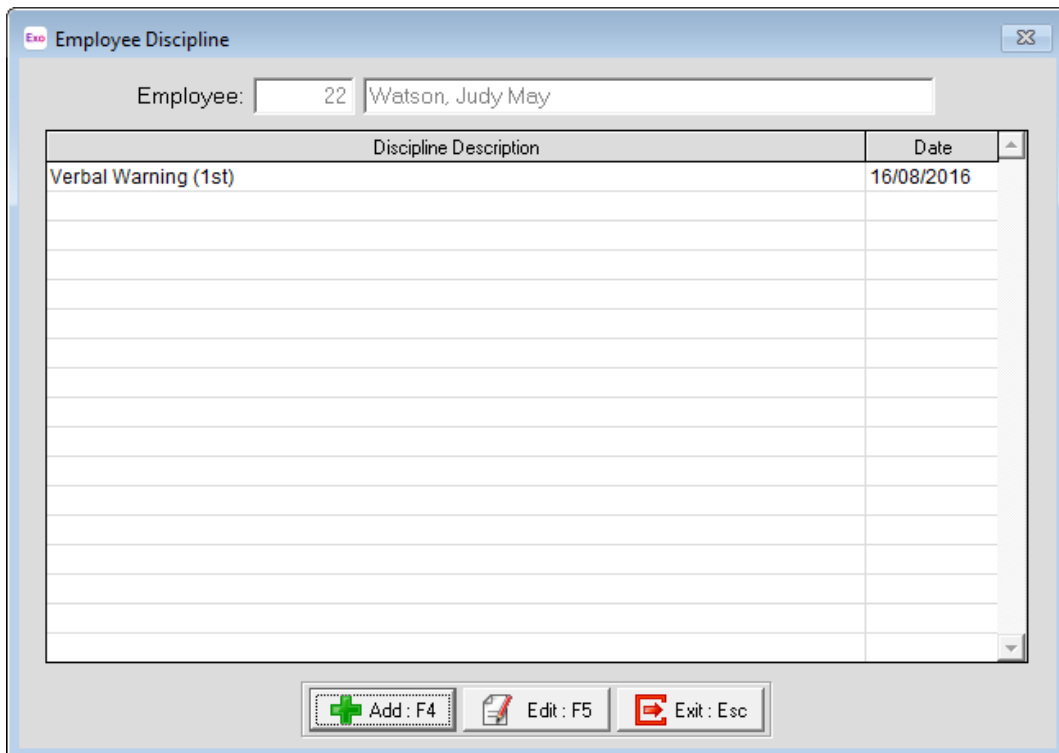
MYOB EXO Employee Information

To add a discipline record, click the **Add** button. To edit an existing record, select the record and click **Edit**. Records are added and edited on the following window:

Discipline Description Select the type of disciplinary action taken. Click the [...] button to open a window listing all types, where new types can be added. You are also able to edit or delete any of the existing discipline types.

Date of Discipline Enter the date disciplinary action was taken.

Time Enter the time of the discipline meeting.

Incident Witness Enter the name of the witness to the incident that resulted in the disciplinary action.

Incident Details Enter the details of the incident that resulted in the disciplinary action.

Meeting Witness Enter the name of the witness at the meeting.

Meeting Details Enter details of the meeting including the employee's views on the incident.

Proposed Action Enter details of the proposed action to be taken.

Click the [image] button to preview and print out a copy of the Disciplinary Action report.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the discipline.

Benefits History

MYOB Exo Employee Information keeps a log of any employee benefits outside of their remuneration history, e.g. company cars, superannuation, medical insurance etc.

Access an employee's benefits by clicking the **Benefits History** button on the Other tab of the Employee Maintenance window (see page 30).
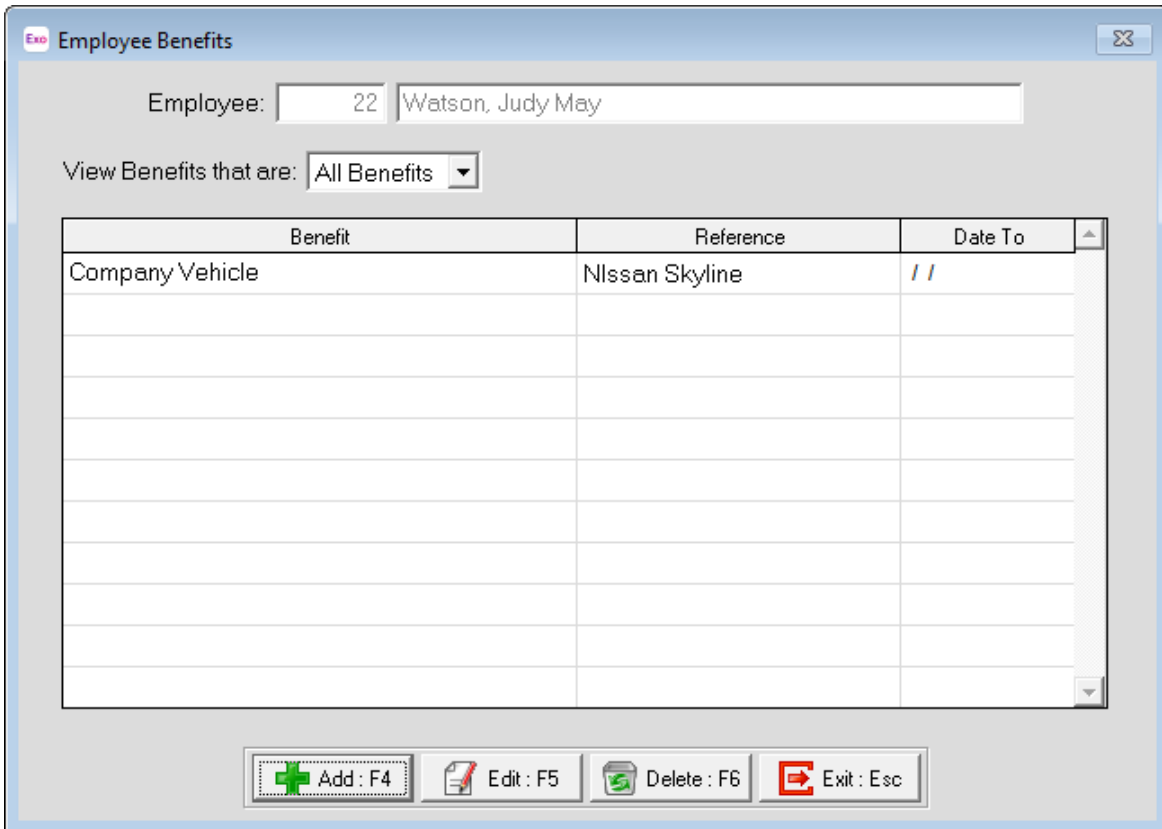
MYOB EXO Employee Information

To add a benefit, click the **Add** button. To edit an existing benefit, select it and click **Edit**. Benefits are added and edited on the following window:

Benefit Select the type of benefit. Click the [...] button to open a window listing all types, where new types can be added. You are also able to edit or delete any of the existing benefit types.

Reference Enter a reference if applicable, e.g. medical insurance number if the company is providing the employee with medical insurance cover.

Date From / To Enter the date(s) that the benefit applies from/to.

Reminder To set up a reminder for when the training course is due to take place, enter a reminder date and specify recipients.

Details Enter any other additional information pertaining to the benefit.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Exit Interview

Exit Interview Plans (see page 69) are assigned to an employee by clicking the **Exit Interview** button on the Other tab of the Employee Maintenance window (see page 30).

If no plan has been assigned to the employee yet, you are asked to choose a plant:

Once a plan has been selected, the following window appears:

MYOB EXO Employee Information

In this window you will see the points (steps) displayed. Tick the box in the Done column once each step is completed. This will automatically insert the date that the job was ticked as being completed. If you require the date to be changed you can override it.

To enter details for a point, double-click on it and you will be taken to a window that contains a text box for entering additional information. You also have the ability to enter in a reminder date relating to this, which would result in a reminder being displayed on entry into the system and thereafter until the step was signed off as being completed.

Click the button to preview and print out a copy of the Exit Interview Plan.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the exit interview plan.

Security

The Security tab of the Employee Maintenance window establishes who is able to look at the selected employee's data. This enables security to be self-contained to one or many sets of employees per user.
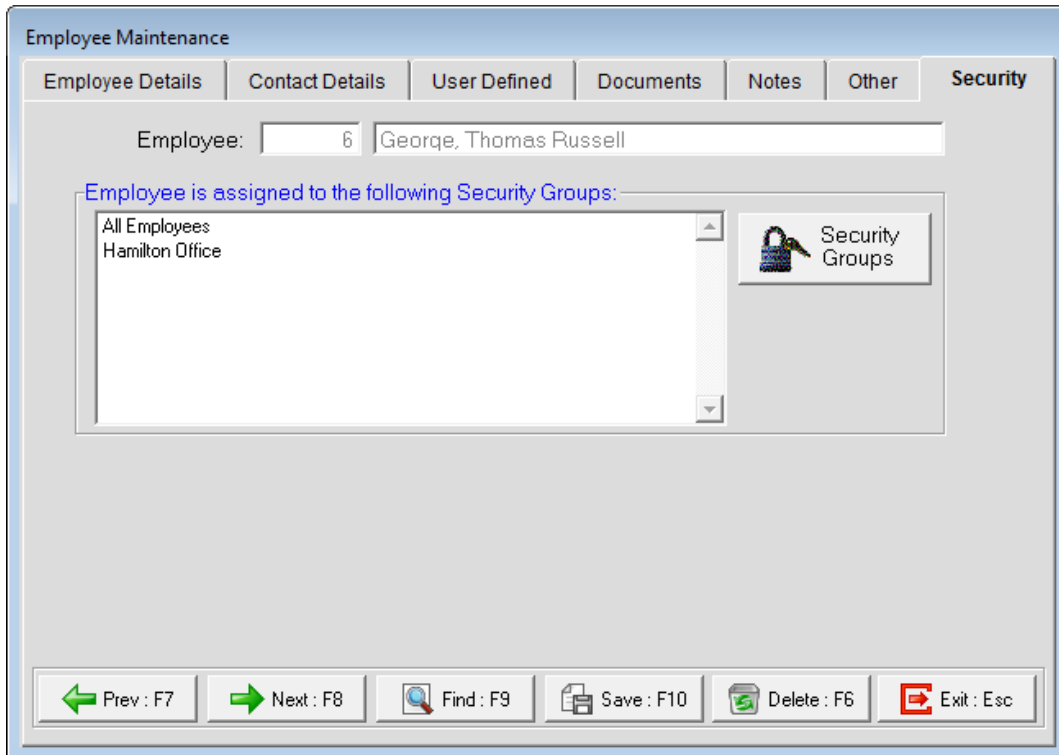
The tab lists all User Security Groups (see page 107) that the employee belongs to. Click the **Security Groups** button to change the Security Groups assigned to the employee.
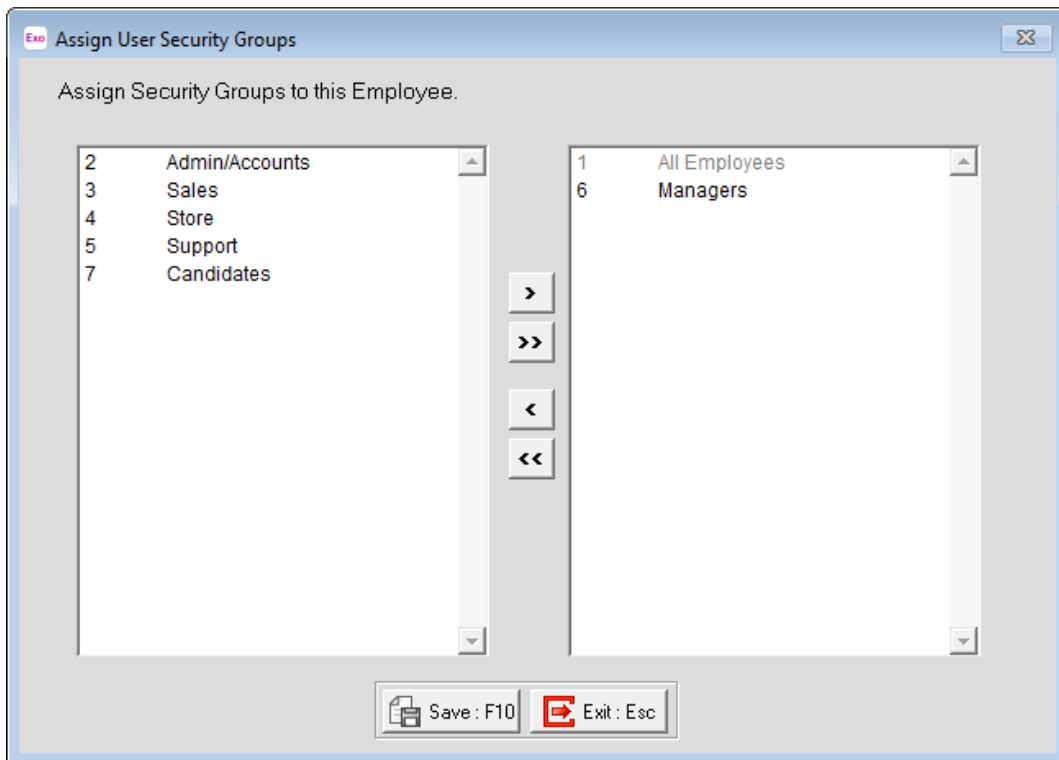
All unassigned Security Groups are listed on the left; all Security Groups assigned to the employee are listed on the right. You can click on groups and drag them from one list to the other.

> Moves the selected group to the list of assigned groups.

>> Moves all groups to the list of assigned groups.

< Moves the selected group from the list of assigned groups back to the main list.

<< Moves all groups from the list of assigned groups back to the main list.

Terminate/Reinstate
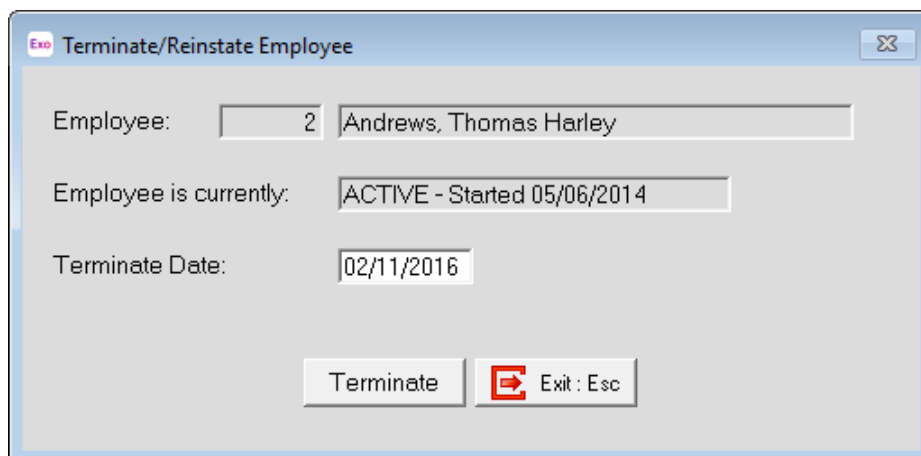
How employees are terminated and reinstated depends on whether or not MYOB Exo Employee Information is installed standalone or integrated with MYOB Exo Payroll.

Integrated System (Exo Payroll & Exo Employee Information)

Employees are not terminated or reinstated in MYOB Exo Employee Information; these operations are performed in Exo Payroll. See the Exo Payroll documentation for information on how to add employees.

Standalone System (Exo Employee Information only)

Employees can be terminated or reinstated at any time. To terminate an employee or reinstate a previously terminated employee, select **Terminate/Reinstate** from the File Menu. You will be asked to select an employee. Enter the code for the employee you want to terminate/reinstate and the following window appears:

Employee Displays the code and full name of the selected employee.

Employee is currently Displays the employee's current status. This will be one of:

- ACTIVE, followed by the employee's start date
- TERMINATED, followed by the employee's termination date

If the employee is currently active, a **Terminate Date** field and **Terminate** button appears below. If the employee is currently terminated, a **Reinstate Date** field and **Reinstate** button appear.

Enter the date of the employee's termination or reinstatement then click **Terminate**/**Reinstate** to terminate/reinstate the employee.

You will be asked to confirm that you want to proceed. Click **Yes** to continue.

> **NOTE:** Terminated employees will still appear in any report that covers a period in which they attended work.

Step Five - Add Employee Information Details
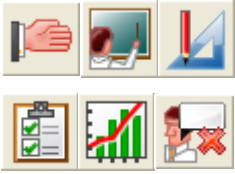
This step lets you set up different areas that can then be associated with employees. The following areas can be set up:

- Induction
- Training
- Skills
- Tasks and Duties
- Performance Reviews
- Exit Interviews

It is recommended that you concentrate on one area at a time, based on your priority.

Induction

All organizations handle the Induction Process differently and in a lot of cases, depending on the different areas within their particular organisation, the Induction Process can differ from department to department.

MYOB Exo Employee Information gives you the ability to design your own induction processes; it is possible to have any number of Induction Plans (see page 72) prepared on your system, which can then be assigned to employees when they start with your organisation.

The Exo Employee Information system works by creating a database of Induction Points (see page 71), containing procedures that can be assigned to one or more Induction Plans.

Induction plans are then assigned to new employees (see page 31) on an individual basis

Click the [button icon] button set up induction plans for new employees.
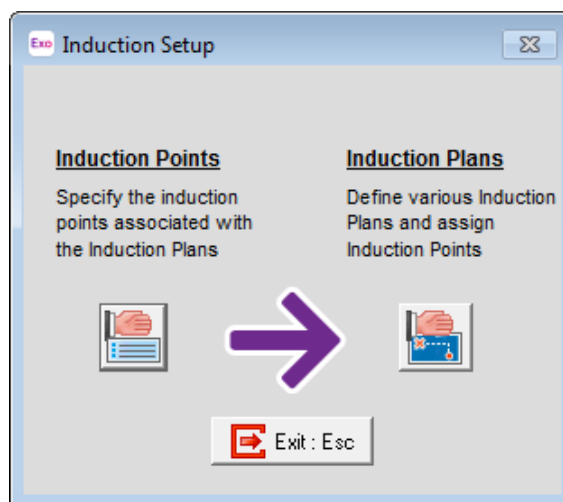
The setup process has two stages:

- Induction Points (see page 71)
- Induction Plans (see page 72)

Training

MYOB Exo Employee Information lets you record details of the providers of training courses that your organisation uses, and the training courses that your employees attend.

Training courses are allocated to Positions and/or Employee Groups, and can also be assigned to employees (see page 39) on an individual basis.

Click the button to set up employee training.

This is the area where you set up the Training information.

The setup process has two stages:

- Training Providers (see page 83)
- Training Courses (see page 85)

Skills

MYOB Exo Employee Information lets you keep a database of skills that can be assigned to employees. This is an optional part of the system.

Click the button to set up a database of skills (see page 78), which can then be assigned to the employees.

Skills are allocated to Positions and/or Employee Groups, and can also be assigned to employees (see page 35) on an individual basis.

Tasks/Duties

MYOB Exo Employee Information lets you keep a database of tasks and duties that can be assigned to employees. This is an optional part of the system.

Click the button to set up a database of tasks and duties (see page 80), including knowledge and responsibilities. Once the task or duty has been created it can then be assigned to positions, employee groups or a combination of both.

Tasks and duties are allocated to Positions and/or Employee Groups, and can also be assigned to employees (see page 37) on an individual basis.

Performance Review

All organizations handle the Induction Process differently and in a lot of cases, depending on the different areas within their particular organisation, the Induction Process can differ from department to department.
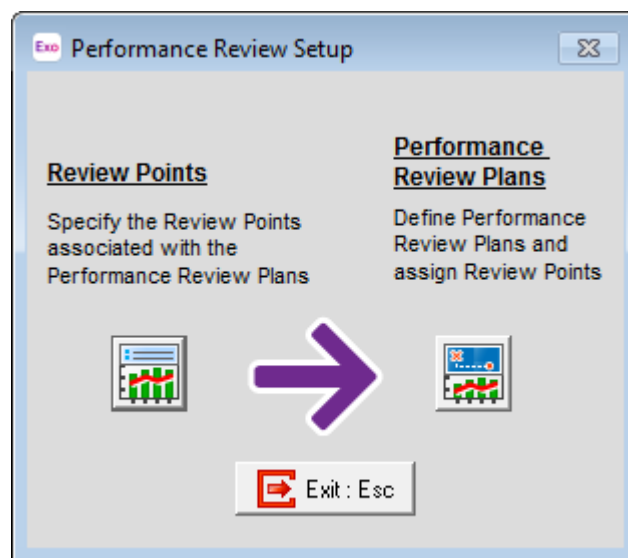
MYOB Exo Employee Information gives you the ability to design your own induction processes; it is possible to have any number of Performance Review Plans (see page 75) prepared on your system, which can then be assigned to employees when they start with your organisation. You are able to set up any number of Plans depending on your requirements but there will be certain points that will be shared between the plans i.e. Team work, Communication etc.

The Exo Employee Information system works by creating a database of Performance Review Points (see page 75), containing procedures that can be assigned to one or more Induction Plans.

Induction plans are then assigned to new employees (see page 41) on an individual basis.

Click the ![icon] button to set up performance review plans that can be assigned to employees on a regular basis.

The setup process has two stages:

- Review Points (see page 75)
- Review Plans (see page 75)

Exit Interview

Each company handles the departure of an employee differently, but more and more organisations are realising that when a good employee leaves, information offered by them in a well-managed exit interview can be valuable.

MYOB Exo Employee Information gives you the ability to design your own exit interviews; it is possible to have any number of Exit Interview Plans (see page 69) prepared on your system, which can then be assigned to an employee at the time of their leaving.

The Exo Employee Information system works by creating a database of Exit Interview Points (see page 69), containing procedures or questions that can be assigned to one or more Exit Interview Plans.

When an employee leaves, an exit interview plan can be assigned (see page 56) to them on an individual basis.

Click the button to set up exit interview plans that can be assigned to employees who are leaving the organisation.

The setup process has two stages:

- Exit Interview Points (see page 69)
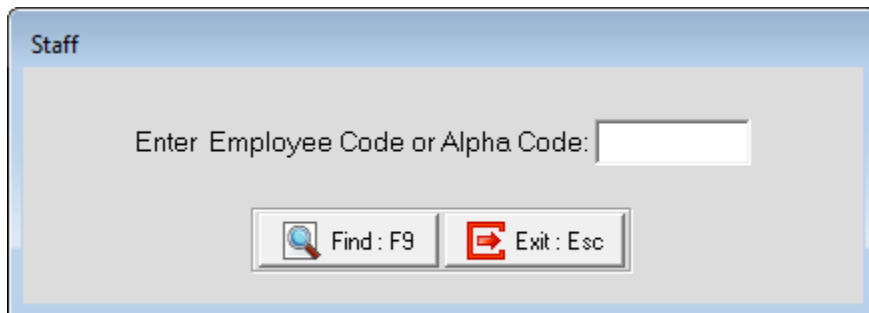- Exit Interview Plan (see page 69)

Step Six - Edit Employees

The actions of adding an employee and opening/editing an employee are essentially the same thing; the functionality and screen layout are the same. The only difference is that when adding an employee, you will get a new employee code and blank screen to begin with. When editing, you will begin with a screen filled with the details you have entered in previous data entry sessions, ready to be modified.

Having Edit Employees as a separate final step in the Setup Cycle allows you to make changes to employees such as assigning plans and training, which may have been added after employees were first added. Also, in the case where Exo Employee Information is integrated with MYOB Exo Payroll, the Add Employee option is not available, as employees are added in Exo Payroll - in this case, the Edit Employees step is the only way to alter employee details.

Select Step Six from the Setup Cycle and the following screen appears:

Enter the Employee Code for the employee you want to edit and press ENTER, or click **Find** to select the employee from a list. The Employee Maintenance screen for the selected employee appears, starting on the Employee Details tab (see page 22).

Employee Maintenance

Candidates

MYOB Exo Employee Information gives you the ability to store information on candidates for positions you are offering. You can store information on applicants and their suitability for particular positions. You are also able to store their interview information, resume/CV etc. Candidates who are accepted for a position can be converted to full employees (see page 22).

To access candidate records, select **Candidates** from the Maintenance menu. A list of candidates appears. Click **Add** to create a new candidate or select an existing candidate and click **Select** to edit them. Candidate records are added and edited on the Candidate Maintenance window.

Candidate Details

Enter the candidate's personal details and contact information.

You can add a photograph of the candidate by clicking the **Insert File** button.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Documents

This tab lets you keep a copy all records relating to the candidate. This may include a letter of offer, interview transcript, CV etc. Any documents entered in here will be transferred across if the candidate becomes an employee.
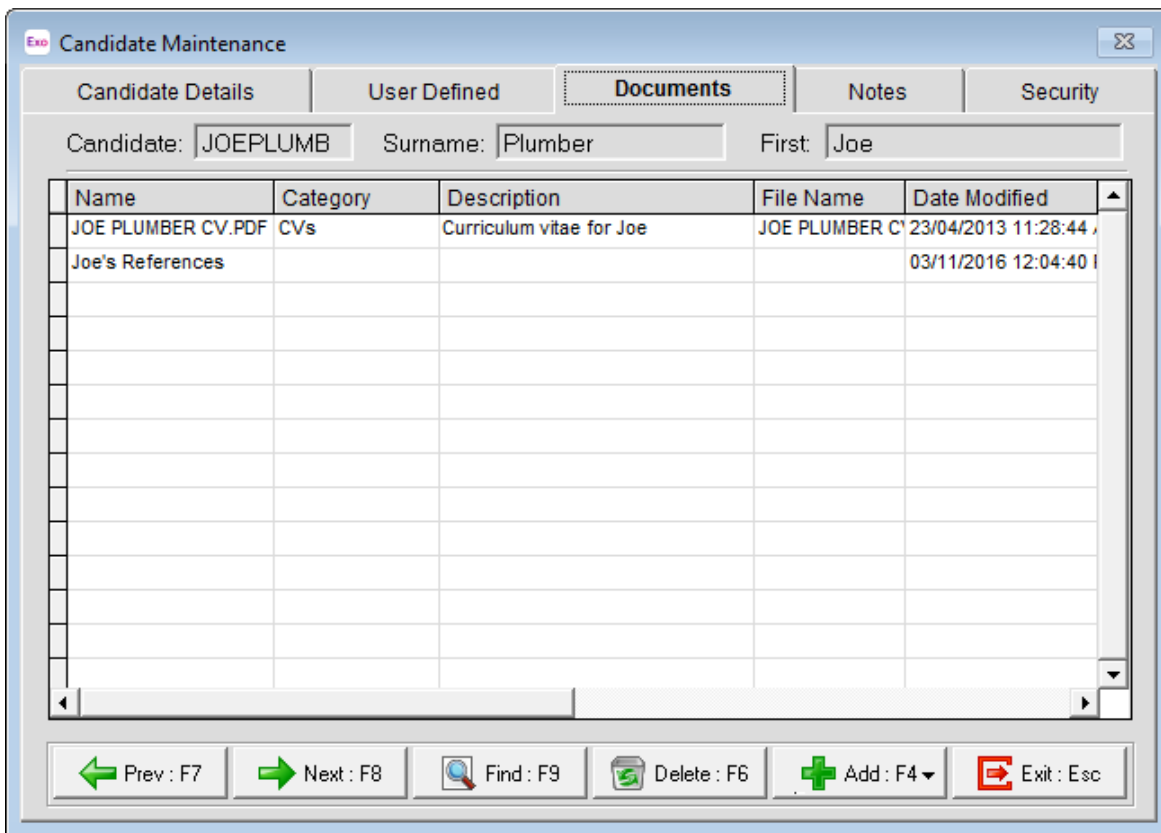
Click one of the options in the **Add** dropdown button to add a new document for the candidate. You can:

- Attach an existing document file (see page 91).

- Create a new document (see page 91) using the built-in word processing interface. You can create a new blank document, or create a document that is based on a Document Template (see page 95).

Double-click on an existing document to open it. If the document is an attached file, it will open in the default editor for the type of file; if it is a document created in Exo Employee Information, it will open in the built-in word processing interface, where it can be edited.

Right-click on a document and select **Edit document properties** to edit the document's Name, Category and/or Description.
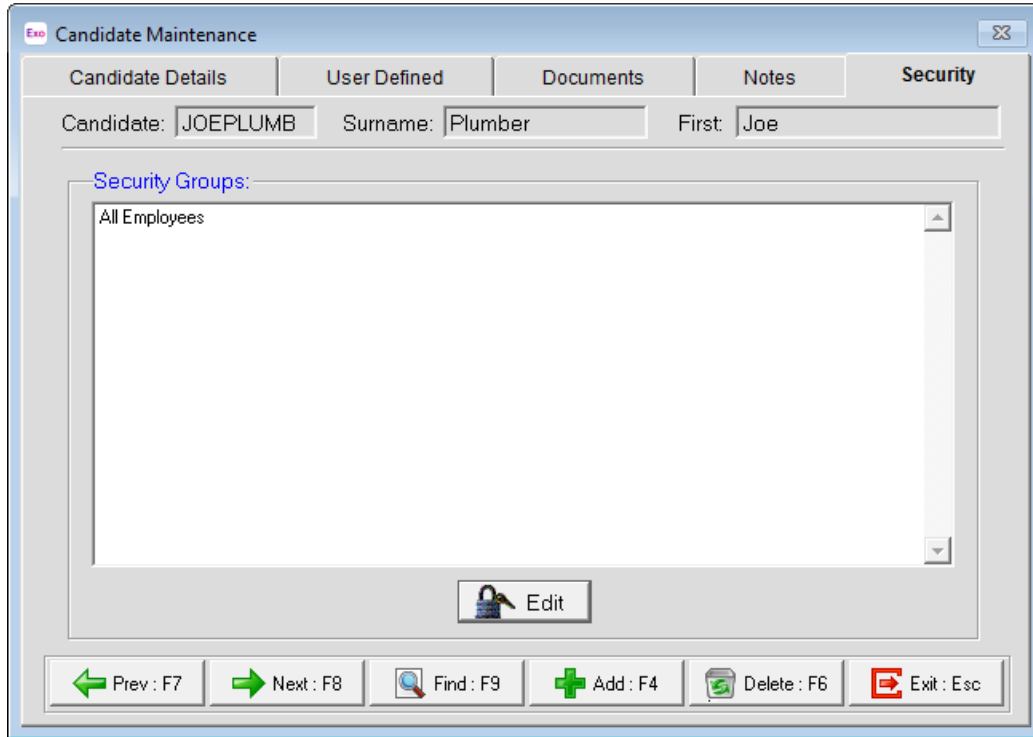
To remove a document from the candidate's file, select it and click the **Delete** button.

Notes

This tab stores notes and reminders for actions relating to the candidate.

Security

This tab establishes who is able to look at the selected candidate's data. This enables security to be self-contained to one or many sets of candidates per user.

The tab lists all User Security Groups (see page 107) that the employee belongs to. Click the **Edit** button to change the Security Groups assigned to the candidate.
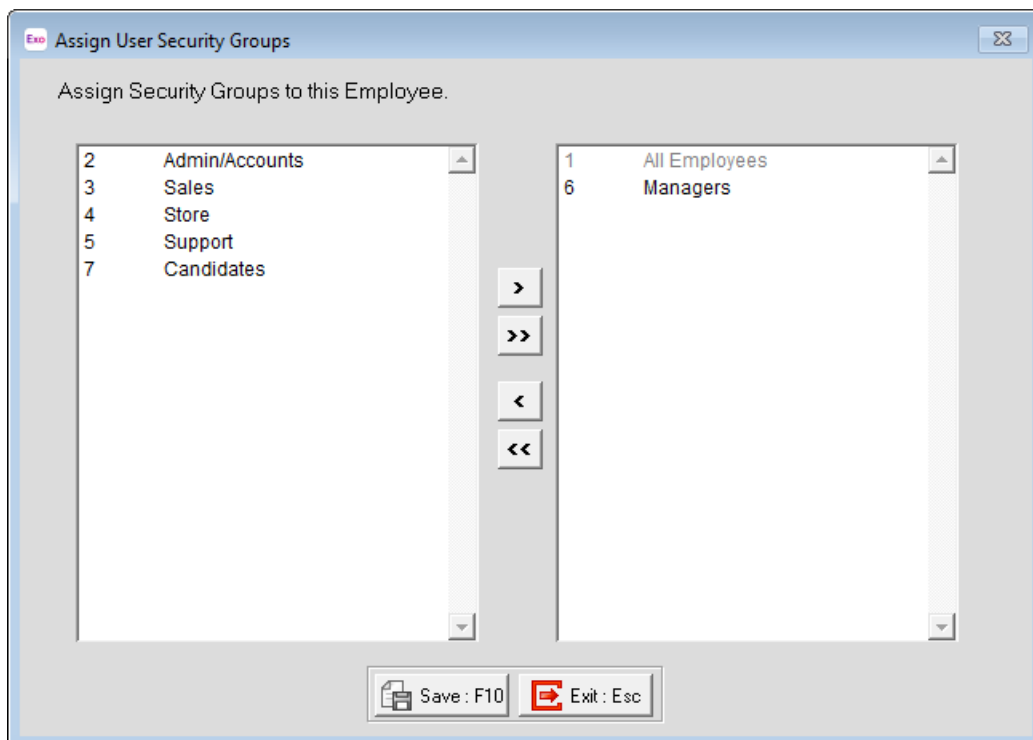
All unassigned Security Groups are listed on the left; all Security Groups assigned to the employee are listed on the right. You can click on groups and drag them from one list to the other.

> Moves the selected group to the list of assigned groups.

>> Moves all groups to the list of assigned groups.

< Moves the selected group from the list of assigned groups back to the main list.

<< Moves all groups from the list of assigned groups back to the main list.

Career Plan Goals

Career Plans (see page 45) can be assigned to all employees. The ability to manage employees' career planning is a valuable asset in any organisation. Although the career planning feature is not a compulsory one, it is nonetheless important. Career plans are made up of individual career planning options or goals, which can be re-used in multiple plans.

> **TIP:** This area can also be used for Succession Planning if that is a requirement in your organisation.

To set up Career Plan Goals, select **Career Plan Goals** from the Maintenance menu. A list of goals appears. Click **Add** to create a new goal, or highlight an existing goal and click **Select** to edit it. Career Plan Goals are added and edited on the following window:

Name Enter a short name for the goal.

Description Describe the goal in full.

Exit Interviews

Exit Interview Points

MYOB Exo Employee Information gives you the ability to design your own exit interviews; it is possible to have any number of Exit Interview Plans (see page 69) prepared on your system, which can then be assigned to an employee at the time of their leaving. Exit Interview Plans involve a selection of Exit Interview Points, which define the individual steps or questions involved in the interview.

To set up Exit Interview Points, select **Exit Interviews > Exit Interview Points** from the Maintenance menu. A list of points appears. Click **Add** to create a new point, or highlight an existing point and click **Select** to edit it. Exit Interview Points are added and edited on the following window:


Name Enter the name of the point.

Description Enter a full description of the procedure or question that this point involves, so the person interviewing the departing employee has a guideline for the information required.

Exit Interview Plans

MYOB Exo Employee Information gives you the ability to design your own exit interviews; it is possible to have any number of Exit Interview Plans prepared on your system, which can then be assigned to an employee at the time of their leaving. Exit Interview Plans involve a selection of Exit Interview Points (see page 69), which define the individual steps or questions involved in the interview.

To set up Exit Interview Plans, select **Exit Interviews > Exit Interview Plans** from the Maintenance menu. A list of plans appears. Click **Add** to create a new plan, or highlight an existing plan and click **Select** to edit it. Exit Interview Plans are added and edited on the following window:
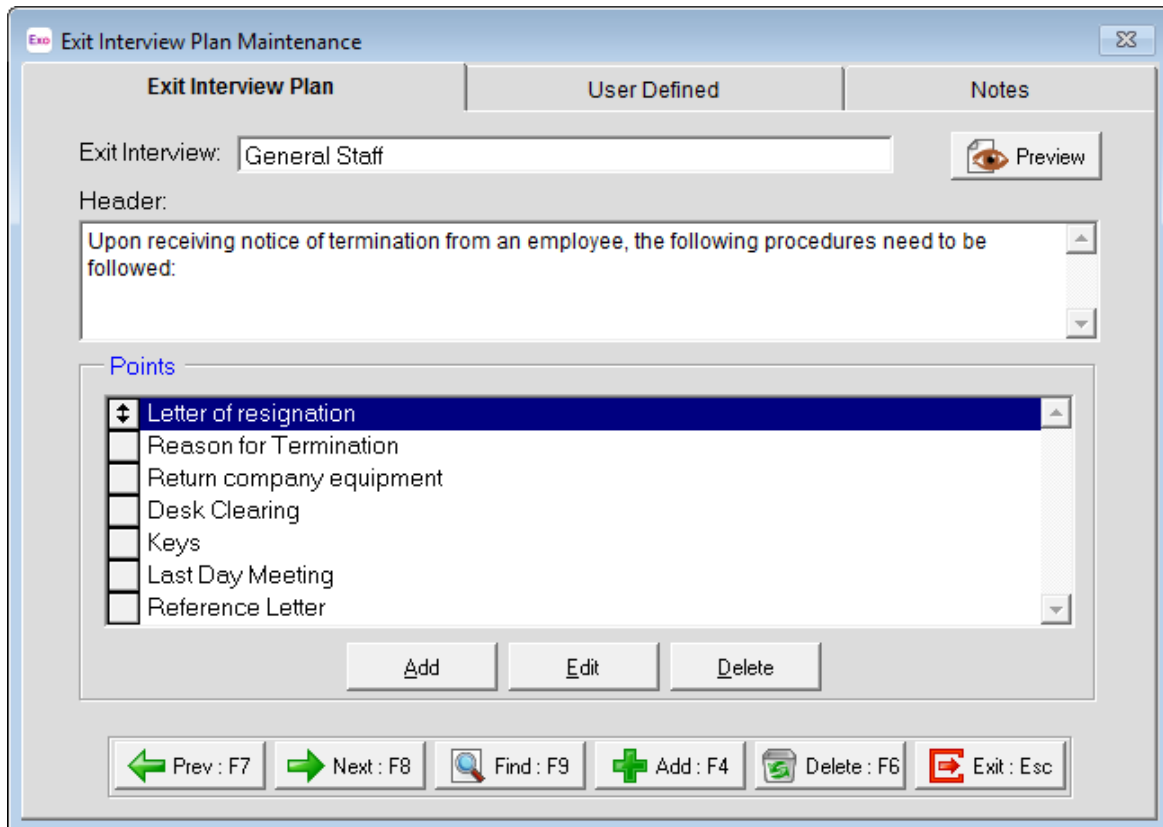
Click the button to preview and print out a copy of the Exit Interview Plan.

Exit Interview Enter a name for the plan.

Header Enter information that will be displayed at the top of the Exit Interview Plan when it is printed out. This can include instructions on conducting the interview.

Points Assign Exit Interview Points (see page 69) to the plan. The following operations are available:

- Click the Add button to add a new point to the plan.
- Select a point and click Edit to open the Interview Points Maintenance window (see page 69) to edit the text of the point.
- Select a point and click Delete to remove it from the plan.
- Once added, points can be dragged up and down to reorder them.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the exit interview plan.

Induction

Induction Bullet Points

MYOB Exo Employee Information gives you the ability to design your own induction processes; it is possible to have any number of Induction Plans (see page 72) prepared on your system, which can then be assigned to employees when they start with your organisation. Induction Plans involve a selection of Induction Points, which define the individual steps or questions involved in the process.

To set up Induction Points, select **Induction > Induction Bullet Points** from the Maintenance menu. A list of points appears. Click **Add** to create a new point, or highlight an existing point and click **Select** to edit it. Induction Bullet Points are added and edited on the following window:

Name Enter the name of the Induction Point.

Description Enter details of the point, so that the person handling the induction has a guideline for the information to be covered.

Induction Plans

MYOB Exo Employee Information gives you the ability to design your own induction processes; it is possible to have any number of Induction Plans prepared on your system, which can then be assigned to employees when they start with your organisation. Induction Plans involve a selection of Induction Points (see page 71), which define the individual steps or questions involved in the process.

To set up Induction Plans, select **Induction > Induction Plans** from the Maintenance menu. A list of plans appears. Click **Add** to create a new plan, or highlight an existing plan and click **Select** to edit it. Induction Plans are added and edited on the following window:

Click the [icon] button to preview and print out a copy of the Exit Interview Plan.

Induction Plan Enter a name for the Induction Plan.

Induction Belongs To If you have also purchased the MYOB Health and Safety module, you can classify the Induction as being a function of either Health and Safety or Exo Employee Information. For example, a Safety Induction Plan could be sourced from Health and Safety, but a Management Induction Plan could be sourced from Employee Information.

A key objective of the Induction process is to provide a set of instructions that adequately safeguard the physical health and well-being of new employees and/or contractors that are coming into the workplace. OSH guidelines should be followed, when creating an Induction Plan – refer to http://www.osh.dol.govt.nz for more details.

Header Enter information which will be displayed at the top of the Induction Plan when it is printed out. This may include instructions on conducting the Induction process.

Points Assign Induction Bullet Points (see page 71) to the plan. The following operations are available:

- Click the Add button to add a new point to the plan.
- Select a point and click Edit to open the Induction Point Maintenance window (see page 71) to edit the text of the point.
- Select a point and click Delete to remove it from the plan.
- Once added, points can be dragged up and down to reorder them.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.
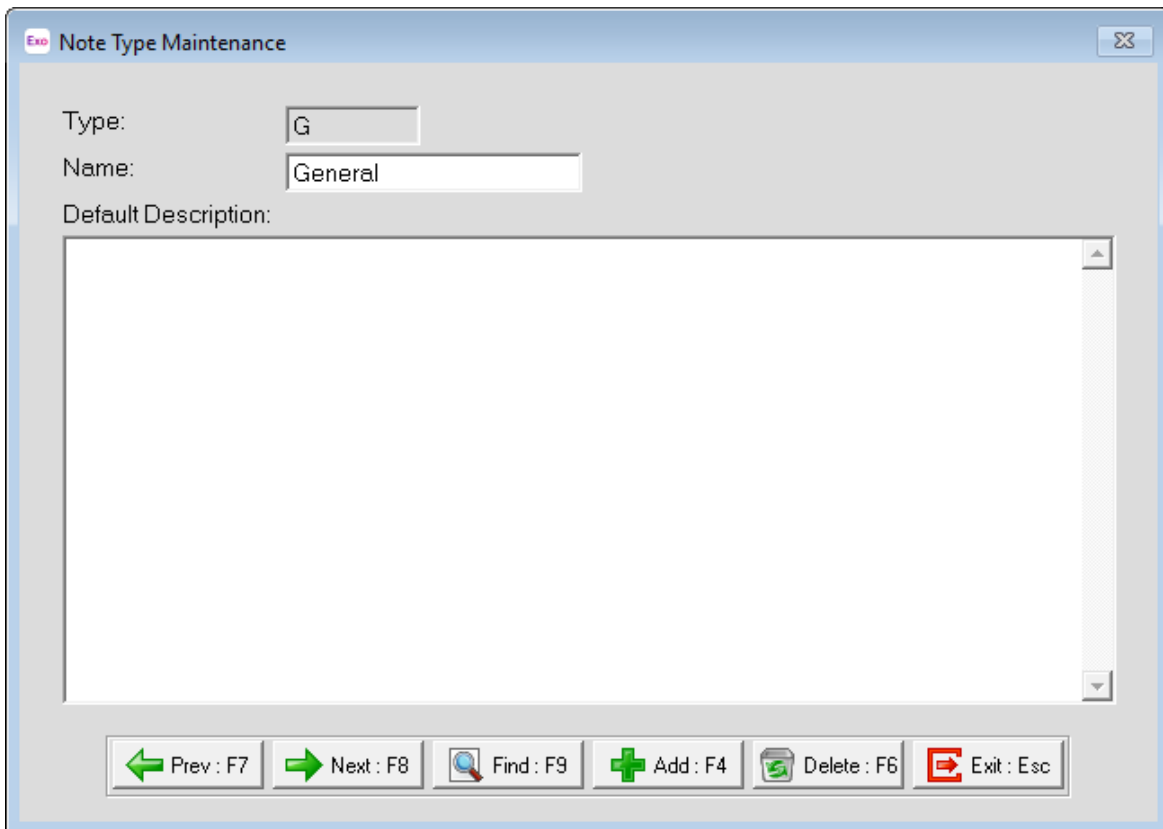
Notes

This tab stores notes and reminders for actions relating to the induction plan.

Note Types

Exo Employee Information automatically inserts notes into an employee's Notes file when certain conditions occur. Notes of various types can be created.

These notes build up in the employee's Notes file creating a pay activity history that can be reported on at any time via the Notes report. You can create your own Note Types and add them to the automatically created notes.

Select **Note Types** from the Maintenance menu to open the Note Types Maintenance window. Press F9 or click **Find** for a list of all Note Types. Press F4 or click **Add** to add a new Note Type:

Note Type Enter the Note Type code that you wish to use. It can be letters, numbers, or a combination of the two. Note Types are also case sensitive so you may choose between upper and lower case letters.

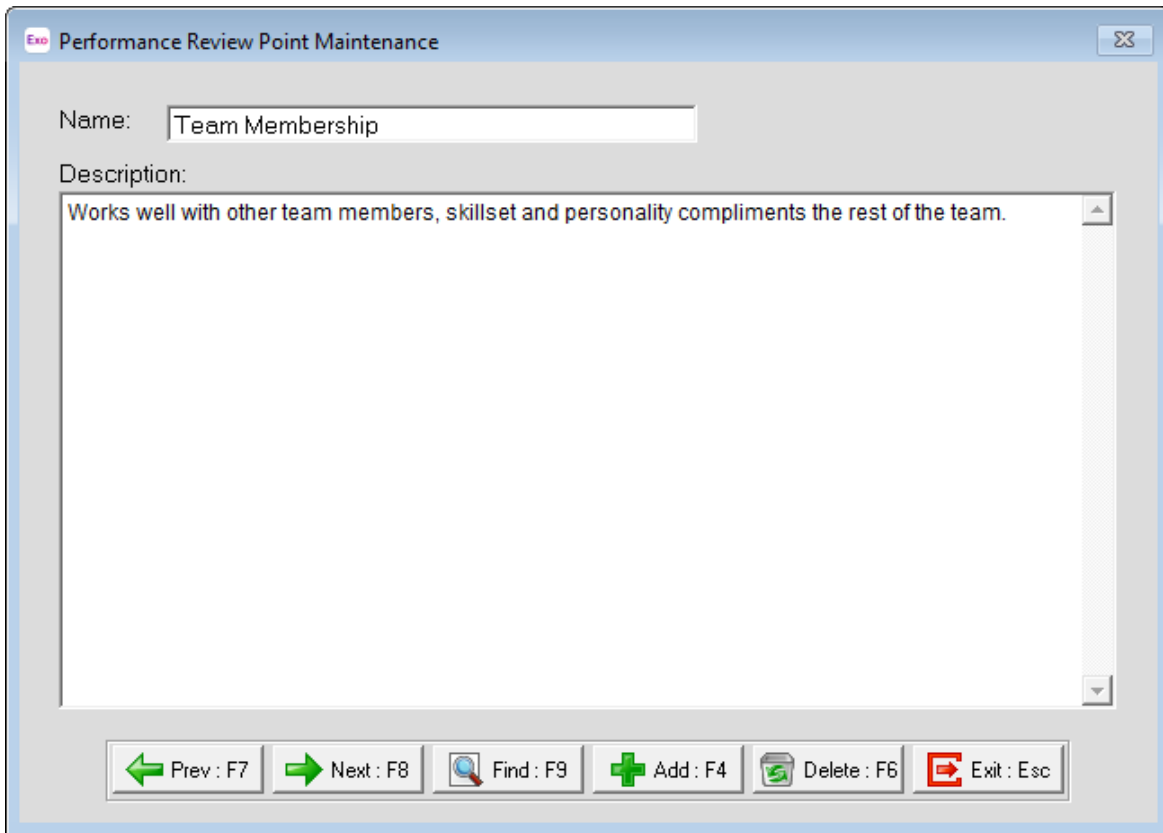**Description** Enter a name to describe the Note Type.

Default Note Enter a default note or template to be added whenever a note of this type is created. Using a default note saves typing in the same information repeatedly and ensures conformity in notes added by users. The default note can be edited or added to if necessary.

Performance Review

Performance Review Points

MYOB Exo Employee Information gives you the ability to design your own performance review processes; it is possible to have any number of Performance Review Plans (see page 75) prepared on your system, which can then be assigned to employees when they start with your organisation. Performance Review Plans involve a selection of Performance Review Points, which define the individual steps or questions involved in the review.

To set up Performance Review Points, select **Performance Review > Performance Review Points** from the Maintenance menu. A list of points appears. Click **Add** to create a new point, or highlight an existing point and click **Select** to edit it. Performance Review Points are added and edited on the following window:

Name Enter the name of the Performance Review Point.

Description Enter details of the point, so that the person handling the induction has a guideline for the information to be covered.

Performance Review Plans

MYOB Exo Employee Information gives you the ability to design your own performance review processes; it is possible to have any number of Performance Review Plans prepared on your system, which can then be assigned to employees when they start with your organisation. Performance Review Plans involve a selection of Performance Review Points (see page 75), which define the individual steps or questions involved in the review.

To set up Performance Review Plans, select **Performance Review > Performance Review Plans** from the Maintenance menu. A list of plans appears. Click **Add** to create a new plan, or highlight an existing plan and click **Select** to edit it. Performance Review Plans are added and edited on the following window:

Click the [icon] button to preview and print out a copy of the Exit Interview Plan.

Name Enter a name for the Performance Review Plan.

Header Enter information that will be displayed at the top of the Performance Review Plan when it is printed out. This may include instructions on conducting the performance review.

Points Assign Performance Review Points (see page 75) to the plan. The following operations are available:

- Click the Add button to add a new point to the plan.
- Select a point and click Edit to open the Performance Review Point Maintenance window (see page 75) to edit the text of the point.
- Select a point and click Delete to remove it from the plan.
- Once added, points can be dragged up and down to reorder them.

Reviewer

Enter the contact details of the person whose responsibility it is to carry out the Performance Review.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Notes

This tab stores notes and reminders for actions relating to the performance review plan.

Skills

MYOB Exo Employee Information lets you keep a database of skills that can be assigned to employees. This is an optional part of the system. The importance of monitoring skills is based entirely on each companies particular requirements; however, if it is important to be able to manage skill levels, keeping track of employee skills can prove to be a valuable tool in managing your organisation's Human Resource requirements.

To set up skills, select **Skills** from the Maintenance menu. A list of skills appears. Click **Add** to create a new skill, or select an existing skill and click **Select** to edit it. Skills are added and edited using the following window:

Click the ⊙ button to preview and print out a document that details the skill.

Details

Alpha Code Enter a short code for the skill. This can be either alphabetical, numerical or a combination of both and up to 10 characters.

Name Enter the name of the skill.

Skill Type Select the type of skill. Click the … button to open a window listing all types, where new types can be added. You are also able to edit or delete any of the existing skill types.

Skill Details Enter the details (or description) of the skill.

Key Performance Indicators Enter any Key Performance Indicators that apply.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Allocate

Skills can be assigned to Positions (see page 15) and/or Employee Groups (see page 12), meaning that they will be assigned to any employees that hold one of those positions or belong to one of those groups.

NOTE: Skills can also be **assigned to employees (see page 35)** on an individual basis.
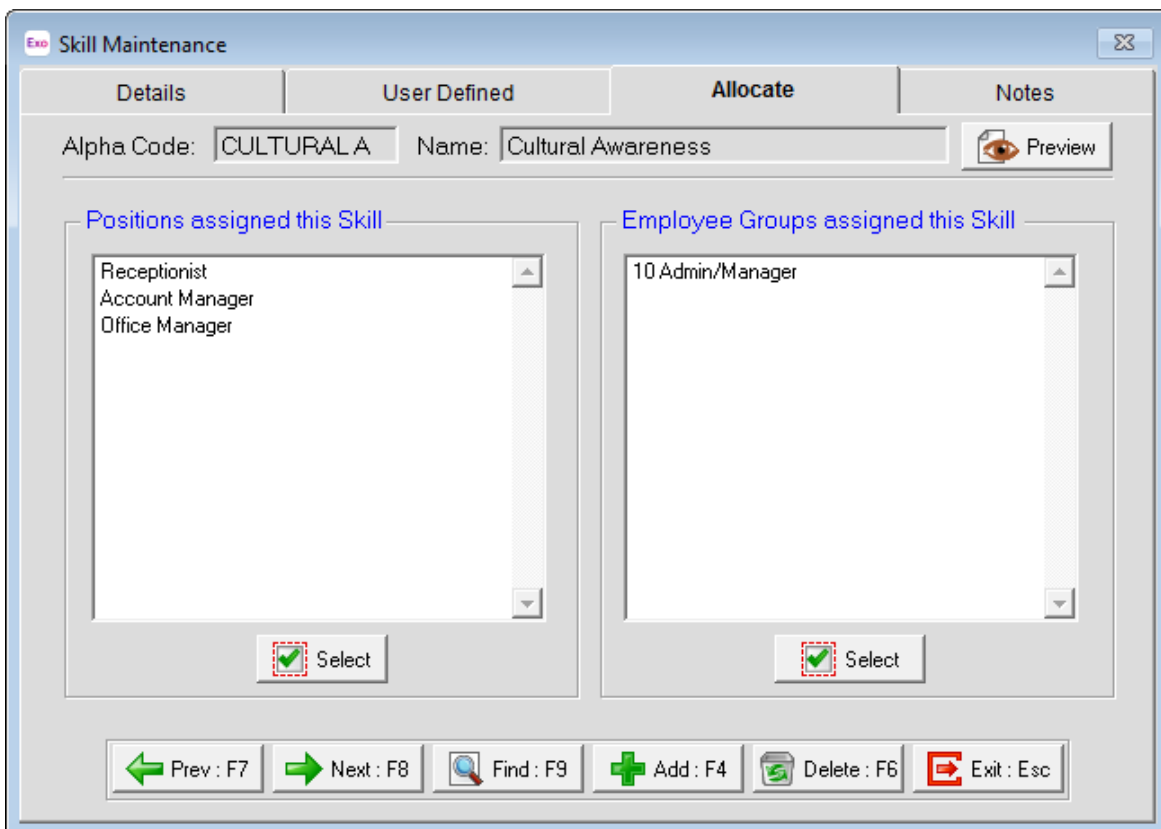
To assign the skill to positions and/or Employee Groups, click the **Select** button in the appropriate area, which displays the available positions/groups:
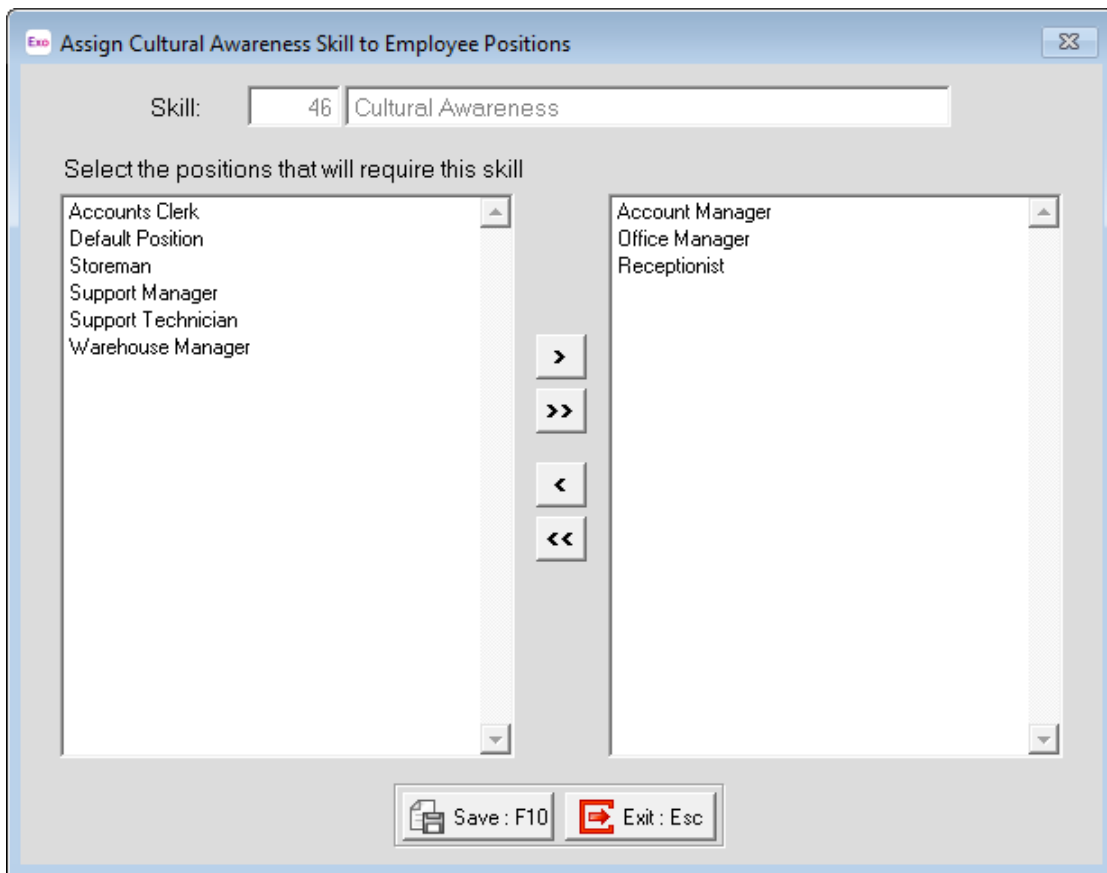
All unassigned positions/groups are listed on the left; all positions/groups that the skill is assigned to are listed on the right. You can click on items and drag them from one list to the other.

> Moves the selected item to the list on the right.

>> Moves all items to the list on the right.

< Moves the selected item from the list on the right back to the main list.

<< Moves all items from the list on the right back to the main list.
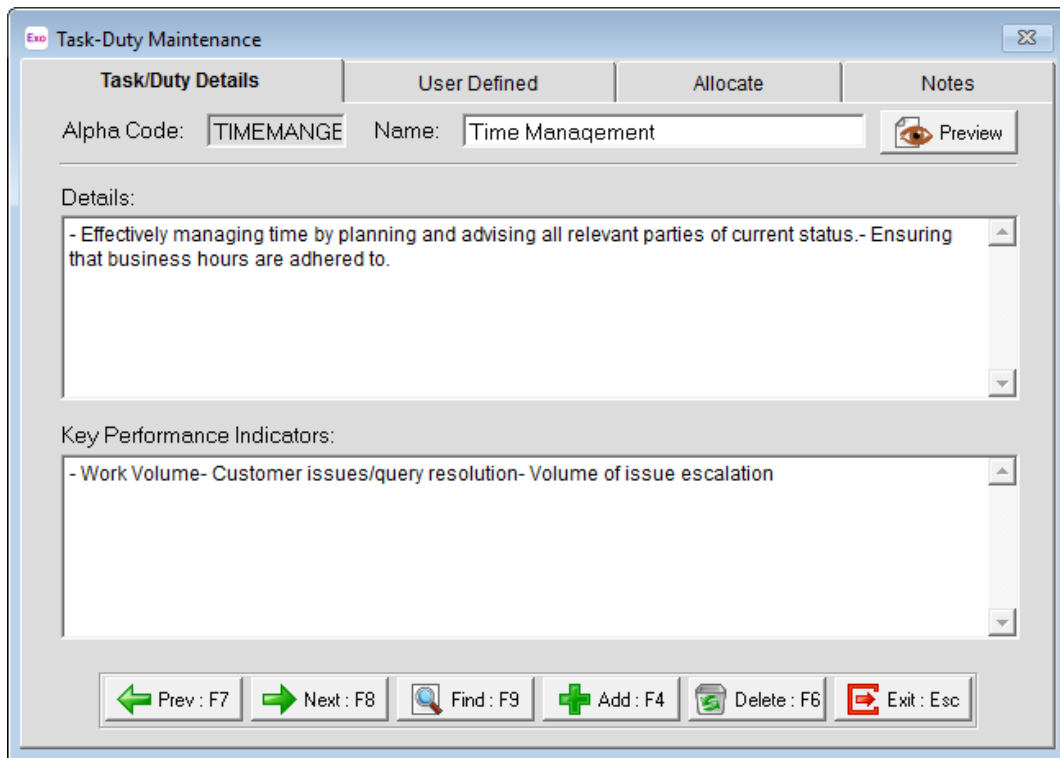
Notes

This tab stores notes and reminders for actions relating to the skill.

Tasks/Duties

MYOB Exo Employee Information lets you keep a database of tasks and duties that can be assigned to employees. This is an optional part of the system. The importance of tasks and duties is based entirely on each company's particular requirements; however, if it is important to be able to manage the responsibilities and knowledge levels outside of standard skills and qualifications, it can prove to be a valuable tool in managing your organisation's Human Resource requirements. This area can be used to create a database of knowledge e.g. knowledge of current market trends, or responsibilities e.g. reporting requirements, budgets, targets etc.

MYOB EXO Employee Information

To set up tasks and duties, select **Tasks/Duties** from the Maintenance menu. A list of tasks/duties appears. Click **Add** to create a new task/duty, or select an existing task/duty and click **Select** to edit it. Tasks/duties are added and edited using the following window:

Click the button to preview and print out a document that details the task/duty.

Details

Alpha Code Enter a short code for the task or duty. This can be alphabetical, numerical or a combination of both and up to 10 Characters.

Name Enter the name of the task or duty.

Details Enter the details (or description) of the task or duty

Key Performance Indicators Enter any Key Performance Indicators that apply.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

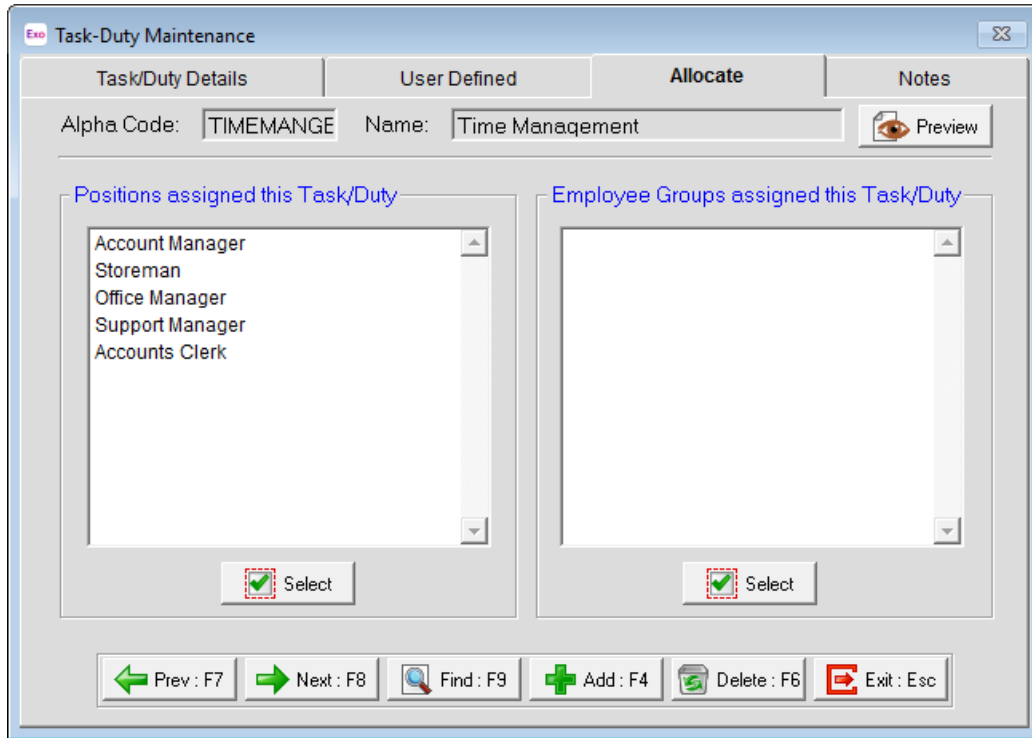The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

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Allocate

Tasks and duties can be assigned to Positions (see page 15) and/or Employee Groups (see page 12), meaning that they will be assigned to any employees that hold one of those positions or belong to one of those groups.

> **NOTE:** Tasks/duties can also be **assigned to employees (see page 37)** on an individual basis.
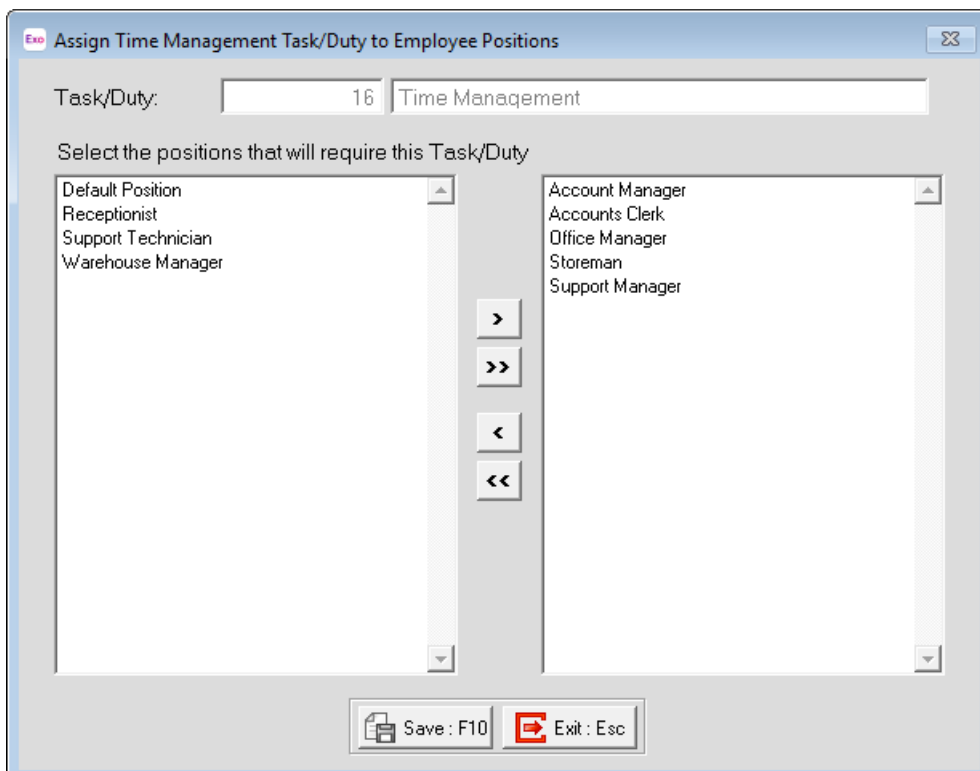
To assign the task or duty to positions and/or Employee Groups, click the **Select** button in the appropriate area, which displays the available positions/groups:

MYOB EXO Employee Information

All unassigned positions/groups are listed on the left; all positions/groups that the task or duty is assigned to are listed on the right. You can click on items and drag them from one list to the other.

> Moves the selected item to the list on the right.

>> Moves all items to the list on the right.

< Moves the selected item from the list on the right back to the main list.

<< Moves all items from the list on the right back to the main list.
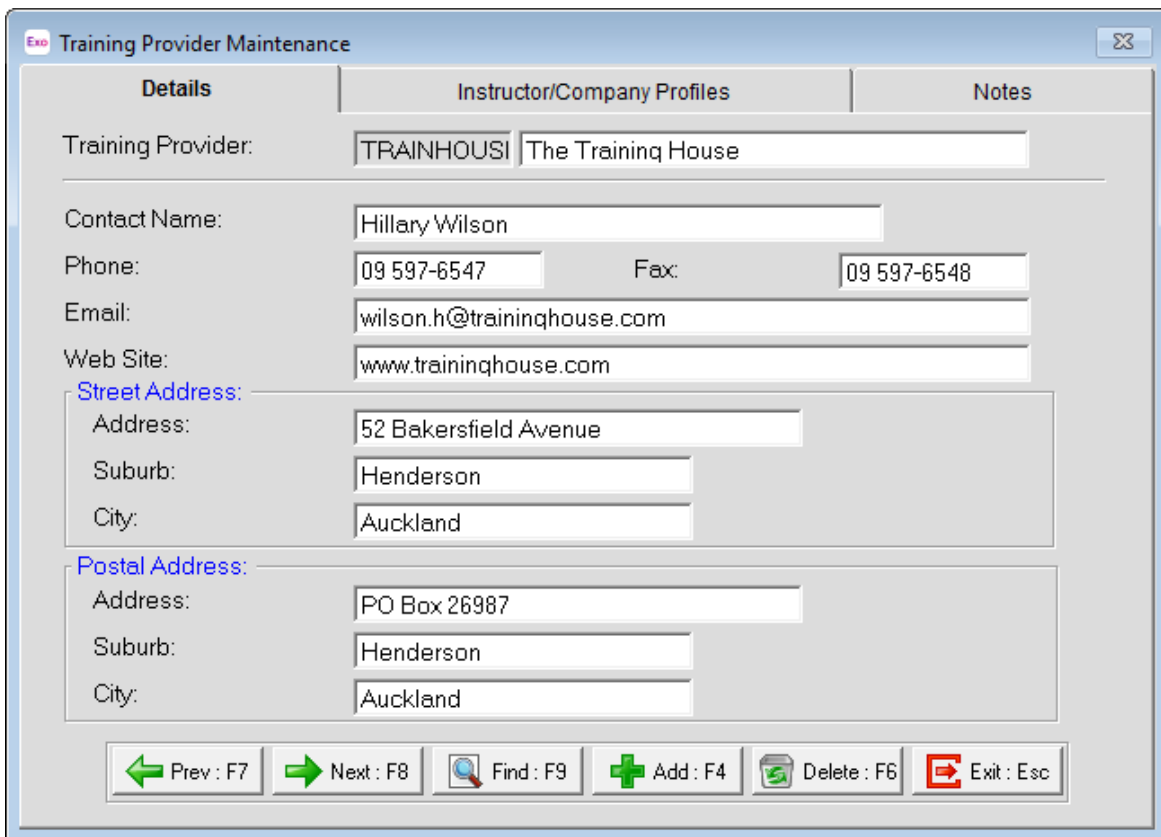
Notes

This tab stores notes and reminders for actions relating to the task/duty.

Training

Training Providers

MYOB Exo Employee Information lets you record details of the providers of training courses that your organisation uses, and the Training Courses (see page 85) that your employees attend.

To set up Training Providers, select **Training > Training Providers** from the Maintenance menu. A list of providers appears. Click **Add** to create a new provider, or select an existing provider and click **Select** to edit it. Training Providers are added and edited using the following window:

Details

Training Provider Enter a code for your Training Provider. The code can be alphabetical, numerical or a combination of both with up to 12 characters. Enter the name of the Training Provider in the next field.

Contact Details Enter the following contact information in the relevant fields:

- Contact Name
- Phone number
- Fax number
- Email address
- Website
- Physical (Street) Address
- Postal Address

Instructor/Company Profiles

Instructor's Profile Enter information relating to the individual instructor that may be relevant in selecting training courses.

Location Enter any extra details of the location of the trainings/seminars, especially if training courses are available at locations different from the addresses specified on the Details tab.

Company Profile Enter details of the company's profile that may be relevant in selecting training courses.
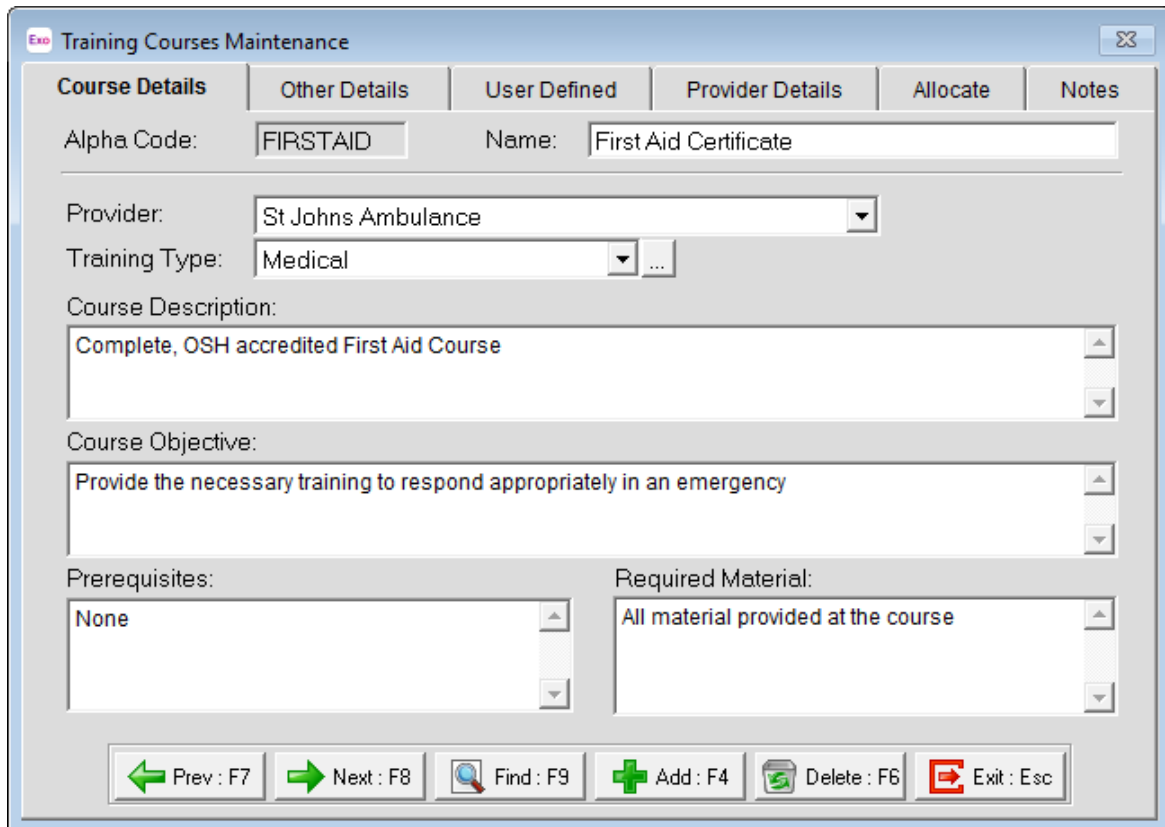
Notes

This tab stores notes and reminders for actions relating to the training provider.

Training Courses

MYOB Exo Employee Information lets you record details of the providers of training courses (see page 83) that your organisation uses, and the Training Courses that your employees attend.

To set up Training Courses, select **Training > Training Courses** from the Maintenance menu. A list of courses appears. Click **Add** to create a new course, or select an existing course and click **Select** to edit it. Training Courses are added and edited using the following window:

Course Details

Alpha Code Enter in a short code for the course. The code can be alphabetical or numerical, or a combination of both with up to 10 characters.

Name Enter the full name of the course.

Provider Select the Training Provider (see page 83) that offers this course.

Training Type Select the type of training. Click the ⬚ button to open a window listing all types, where new types can be added. You are also able to edit or delete any of the existing types.

Course Description Enter descriptive information about the course.

Course Objective Describe the objectives of the course.

Prerequisites Enter any prerequisites for the course, e.g. attendees may be required to have completed the beginners and intermediate course prior to the commencement of an advanced course.

Required Material Enter details of any material that is required for these courses.

Other Details

Automatically Reassign Training

If the course is one that should be undertaken on a regular basis, then you can set the course to be automatically reassigned at the required intervals.

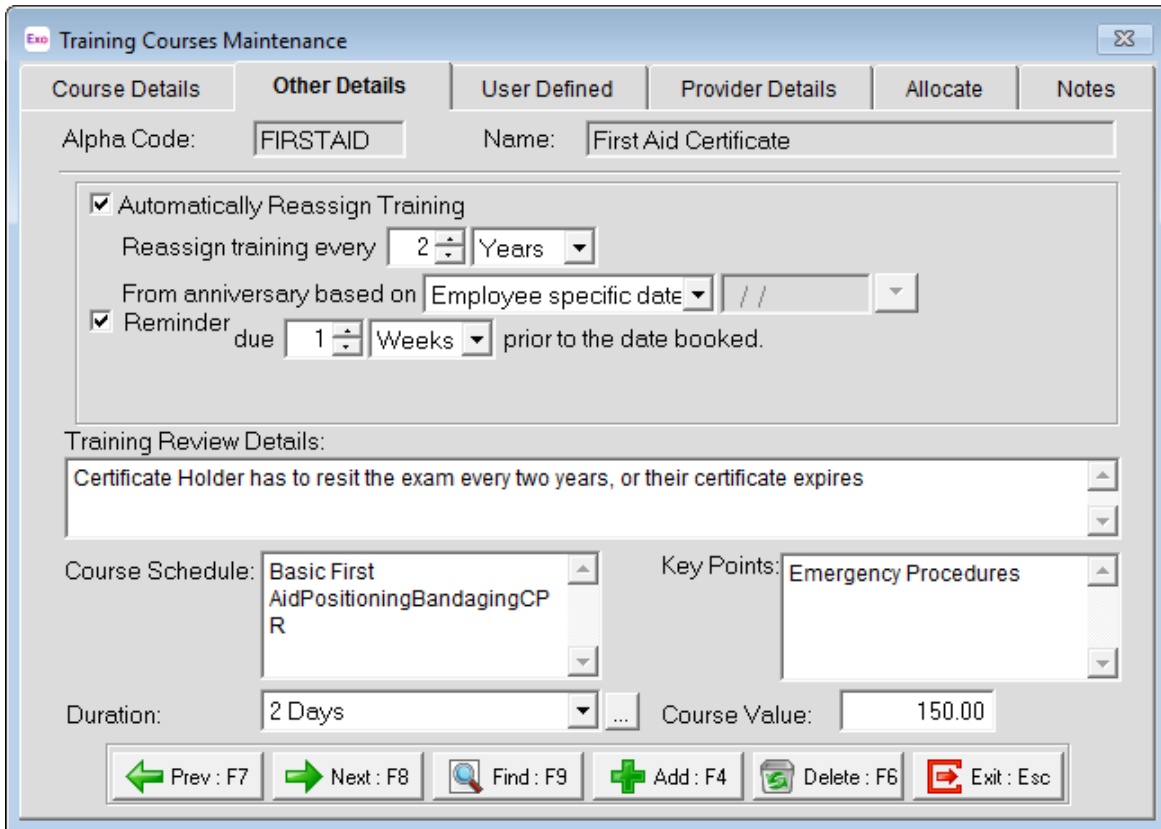To use this option, tick the **Automatically Reassign training** option, then specify how regularly you need to assign the course. You will also need to select what the anniversary is based on e.g. specific date, employee start date etc.

To be automatically reminded that the course will be due again, tick the **Reminder due** option and specify when you want to be reminded.

Training Review Details Enter the training review details, e.g. are you required to get updated information for the course.

Course Schedule Enter the course schedule if applicable.

Key Points Enter any key points.

Duration Select the duration of the course. Click the ![button] button to open a window listing all possible durations, where new durations can be added. You are also able to edit or delete any of the existing durations.

Course Value Enter the course value in dollars and cents. Remember to be consistent when adding information relating to the course value; make a decision on whether course values entered will be inclusive or exclusive of GST.

User Defined

The User Defined tab contains extra generic fields that may be used to customise your data. You can rename some of the "User Defined" fields, and use them to track information that may not have been included in the set screens provided with the system.

With User Defined Fields you can extend the power of the Exo Employee Information system to record items of interest that are not otherwise covered elsewhere.

The following types of User Defined Field are available:

- **Logical** - Place a tick in the box to turn on a logical field.
- **Date** - Enter a date in the format dd/mm/yyyy.
- **Text** - Enter a short comment here.
- **Memo** - Enter a long comment or description here. It can run over several lines.

To give a meaningful name to a field, double-click on the "User Defined" name; this will make the caption editable.

Provider Details

These details are filled in automatically, based on the Training Provider selected on the Course Details tab. They can be altered manually if necessary.

Allocate

Training Courses can be assigned to Positions (see page 15) and/or Employee Groups (see page 12), meaning that they will be assigned to any employees that hold one of those positions or belong to one of those groups.

> **NOTE:** Training Courses can also be **assigned to employees (see page 39)** on an individual basis.

To assign the training course to positions and/or Employee Groups, click the **Select** button in the appropriate area, which displays the available positions/groups:

MYOB EXO Employee Information

All unassigned positions/groups are listed on the left; all positions/groups that the training course is assigned to are listed on the right. You can click on items and drag them from one list to the other.

> Moves the selected item to the list on the right.

>> Moves all items to the list on the right.

< Moves the selected item from the list on the right back to the main list.

<< Moves all items from the list on the right back to the main list.

Notes

This tab stores notes and reminders for actions relating to the training course.

Lookup Tables

Several windows in the Exo Employee Information system allow you to select properties from a lookup table or list , which can be edited and added to suit the needs of your organisation. These lists can be edited from the window that they relate to, but they can also be edited directly from the Maintenance menu.

Select one of the following lookup table from the **Lookup Tables** sub-menu under the Maintenance menu:

- Benefit Types - used on the Benefits History (see page 54) window.
- Disciplinary Descriptions - used on the Discipline History (see page 52) window.
- Ethnicity - used on the Employee Details (see page 22) tab of the Employee Maintenance window.
- Language - used on the Employee Details (see page 22) tab of the Employee Maintenance window.
- Place of Birth - used on the Employee Details (see page 22) tab of the Employee Maintenance window.
- Qualification/Education - used on the Qualification & Education (see page 33) window.
- Skills - used on the Skills Maintenance (see page 78) window.
- Training Course Duration - used on the Training Courses Maintenance (see page 85) window.
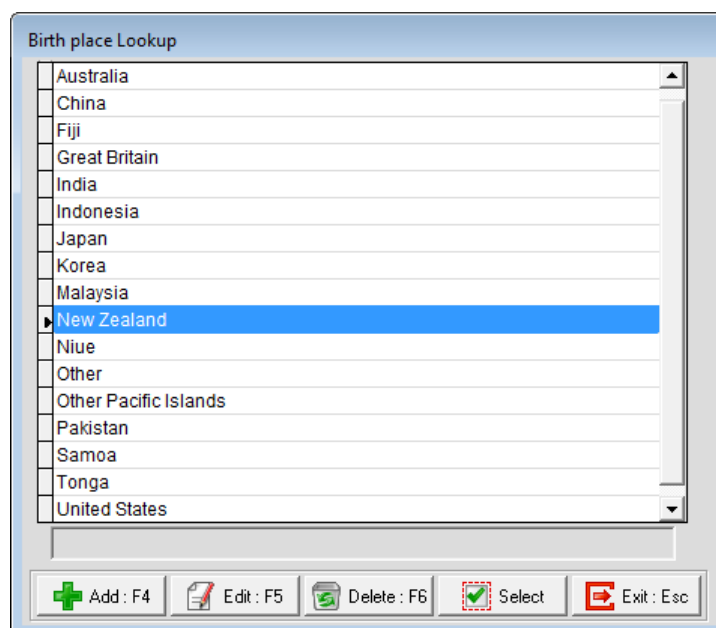
To add an item to a lookup table, click the **Add** button. Enter the new item into the text field at the bottom of the window and click **Save**.

To edit an item on a lookup table, double-click on it or highlight it and click the **Select** button. The text of the item appears in the text field at the bottom of the window. Make any changes and click **Save**.

Documents

Adding Documents

All documents relating to an employee are displayed on the Documents tab of the Employee Maintenance window (see page 27). All documents relating to a candidate are displayed on the Documents tab of the Candidate Maintenance window (see page 66).

To add a new document to an employee or candidate's file, select an option from the **Add** dropdown button on this tab. The drop down has three options:
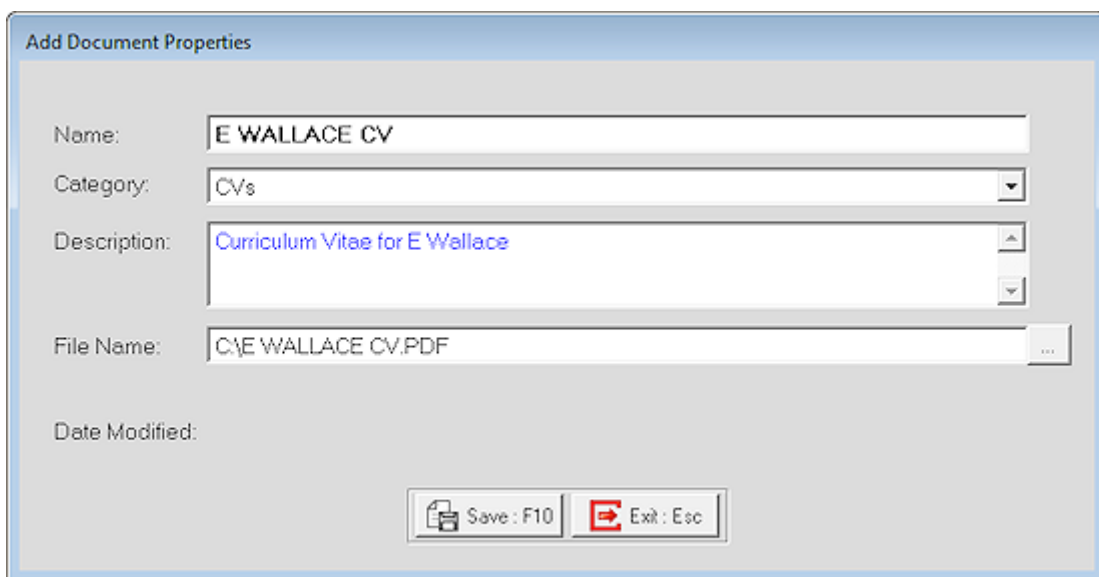
- Click **Attach File** to create a new blank document using Exo Employee Information's built-in word processing interface.

- Click **Create Document** to attach an existing document.

- Click **Create from Template** to create a new document based on an existing document templates (see page 95).

To add general documentation that is not specific to an individual record, use the Company Documents option on the Documents menu (see page 94).

Attaching a File

You can attach any existing file to an employee record.

To attach an existing document to an employee record, select **Attach File** from the **Add** dropdown button. A standard Open window appears - browse to find the document, then click **OK**. You will then be prompted to enter details for the document:

Enter the name and a description for the document (for later reference), and select a Category (you can enter a new category, or select an existing one from the dropdown). Click the **Save** button and the new document now appears on the Documents tab of the Employee Maintenance window. Double-clicking on an attached document opens it in the default editor for the document's type, e.g. a Word document will open in Microsoft Word. Right-clicking on a document and selecting **Edit document properties** lets you edit the document's Name, Category and/or Description.

Attached files are copied to the **Database\employeefiles** or **Database\candidatefiles** folder under the default Employer Services folder (usually **Payrollv**). A separate sub-folder exists for each employee/candidate; sub-folders are named after the employee or candidate's ID number.

> **NOTE:** If an employee or candidate record is deleted, that record's folder and all of the associated documents are also deleted.
>
> **NOTE:** Files attached to employees and candidates are included in company backups if the **Include Employee Document** option is ticked on the Backup Options window.

Creating a New Document

To create a new document, select **Create Document** from the **Add** dropdown button. A window opens where you can enter details for the new document:

Enter the name and a description for the document (for later reference), and select a Category (you can enter a new category, or select an existing one from the dropdown). Click the **Continue** button and the word processing interface appears showing a blank document:

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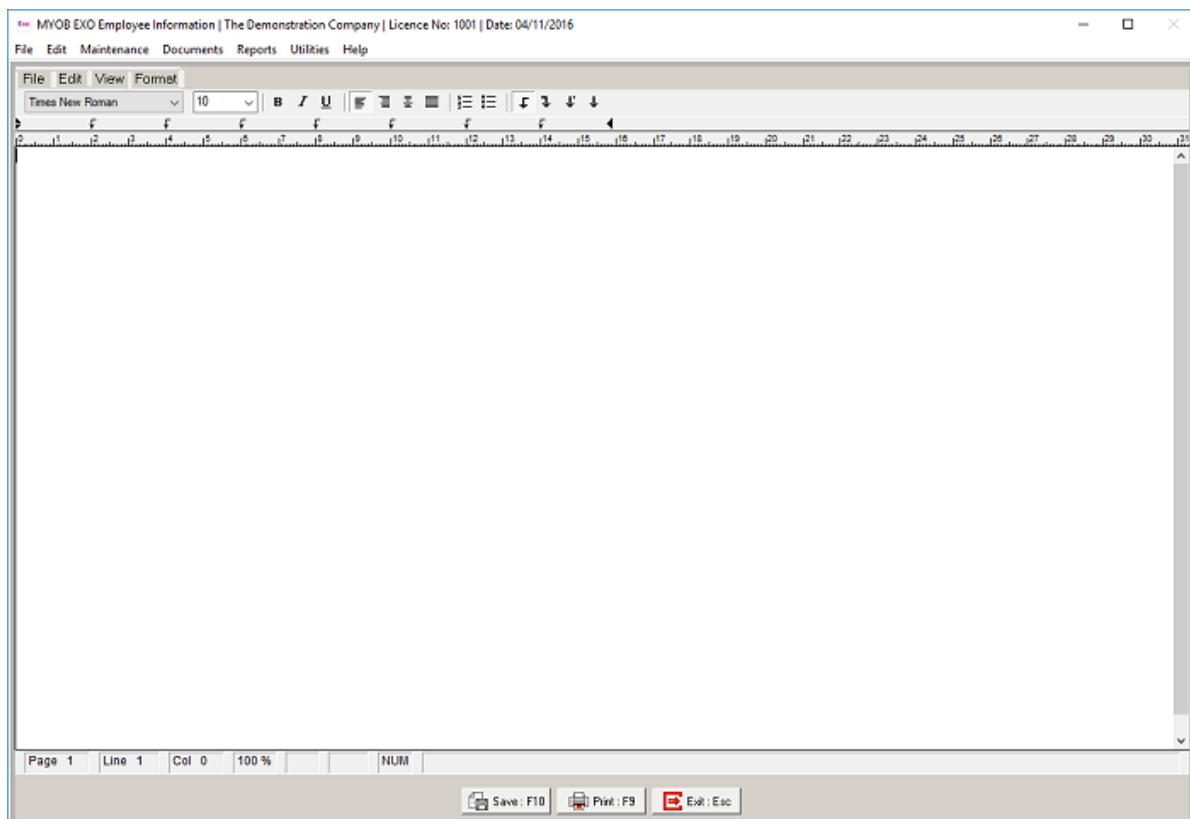
MYOB EXO Employee Information

The word-processing interface in Exo Employee Information uses the RTF (Rich Text Format) standard. This means that plain text can be **bolded**, *italicized*, underlined and coloured, and text can be centred or right-aligned. The formatting functions are controlled by the toolbar buttons and the options in Format menu.

Once you have entered your document text, click the **Save** button.

Creating a Document from a Template

To create a new document, select **Create from Template** from the **Add** dropdown button. A window opens where you can select the template to use:

All available Document Templates are listed here. Select the template to base the document on and click **Select**. A window opens where you can enter details for the new document:
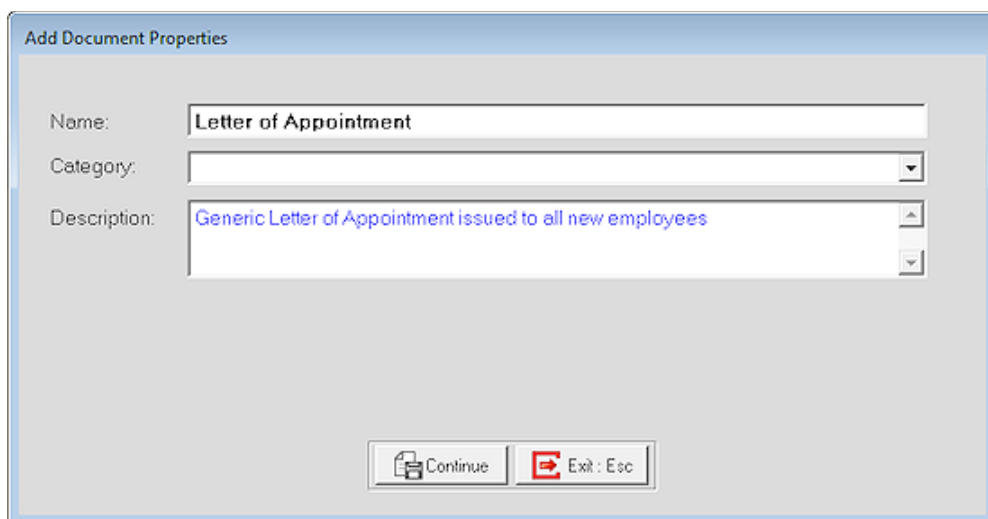
Enter the name and a description for the document (for later reference), and select a Category (you can enter a new category, or select an existing one from the dropdown). Click the **Continue*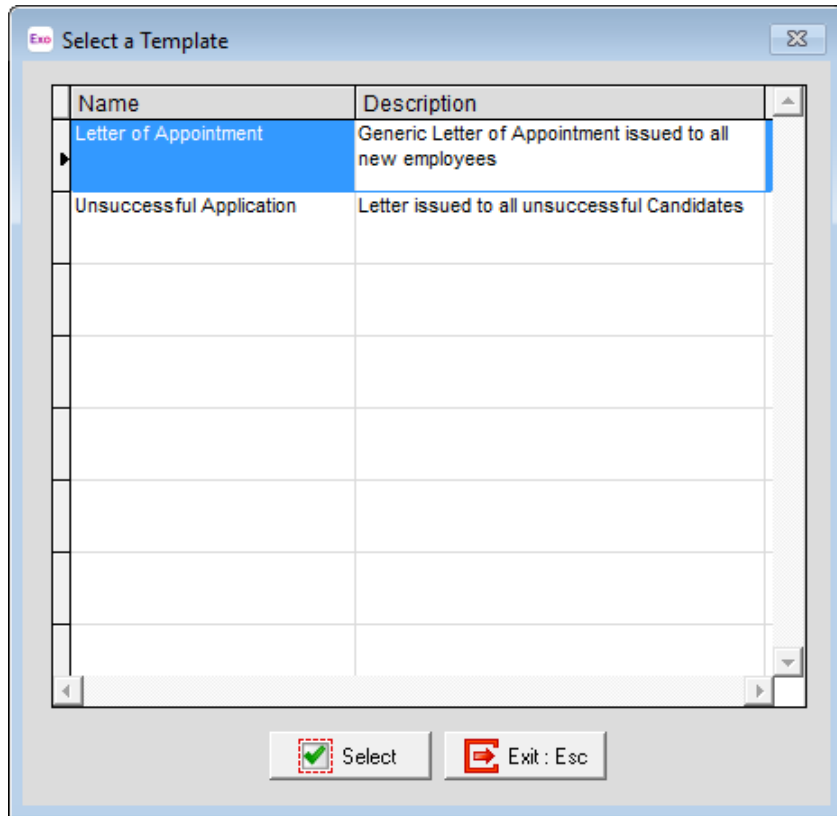* button and the word processing interface appears showing the default template text. Edit the document as normal and click the **Save** button once all edits have been made.

Company Documents

Selecting **Company Documents** from the Documents menu opens the Company Documents window, where you can attach document files related to human resources in general.
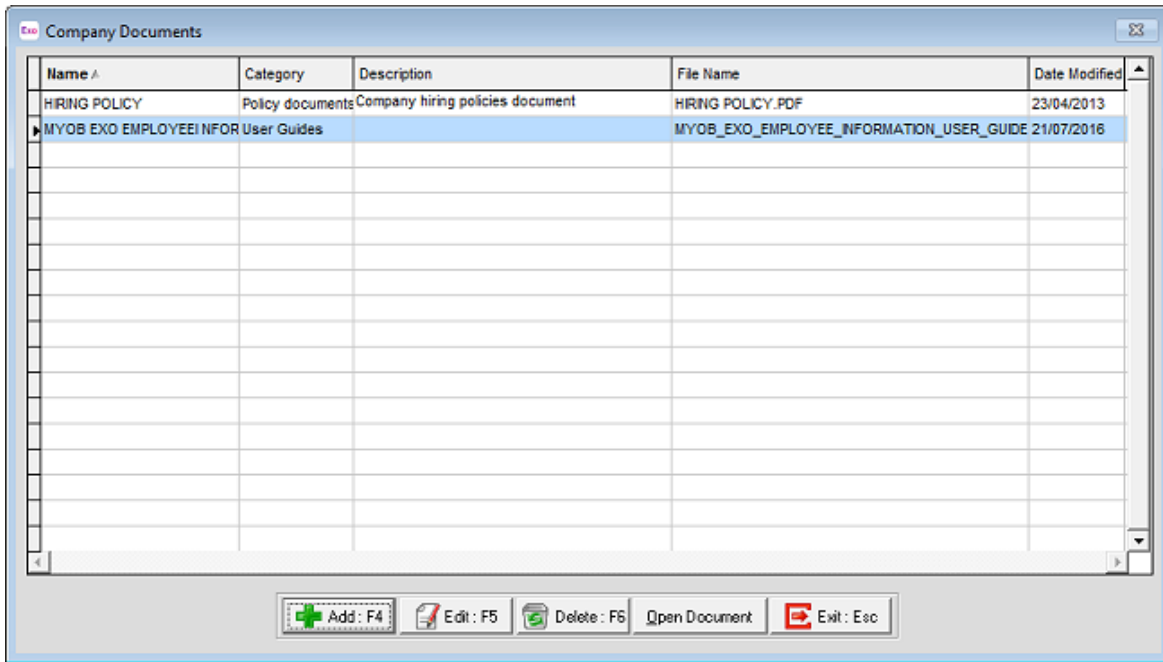
Click the **Add** button to attach a new company document. A standard Open window appears - browse to find the document, then click **OK**. You will then be prompted to enter details for the document:

MYOB EXO Employee Information

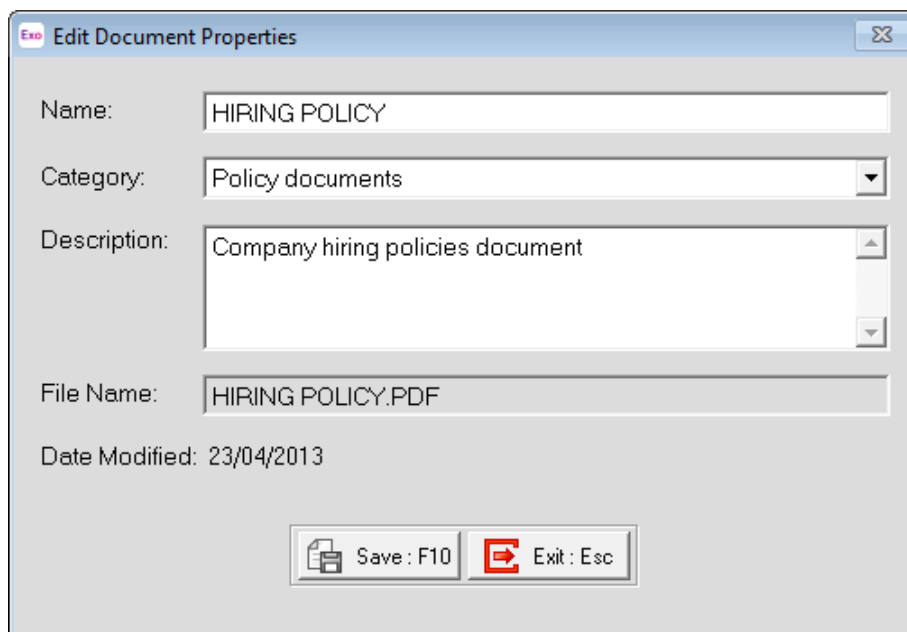Enter the **Name** and a **Description** for the document (for later reference), and select a **Category** (you can enter a new category, or select an existing one from the dropdown). Click the **Save** button and the new document now appears on the Company Documents window.

Attached files are copied to the **Database\companyfiles** folder under the default Employer Services folder (usually **Payrollv**).

> **NOTE:** Files in the **companyfiles** folder are included in company backups if the **Include Company Documents?** option is ticked on the Backup Options window.

Double-click on an existing document, or select the document and click **Open Document**, to open it in the default editor for the type of file.

Select a document and click **Edit** to edit the document's Name, Category and/or Description.

To remove a document from the employee's file, select it and click the **Delete** button.

Document Templates

MYOB Exo Employee Information includes a word processing function that can be used to create documents to attach to Employees (see page 27) or Candidates (see page 65). You can set up document templates to use as a basis for common types of documents.

Select **Document Templates** from the Documents menu. A list of templates is displayed. Click **Add** to create a new template, or select an existing template and click **Edit** to edit it.

Document templates, like documents, are edited using the built-in word processing interface.
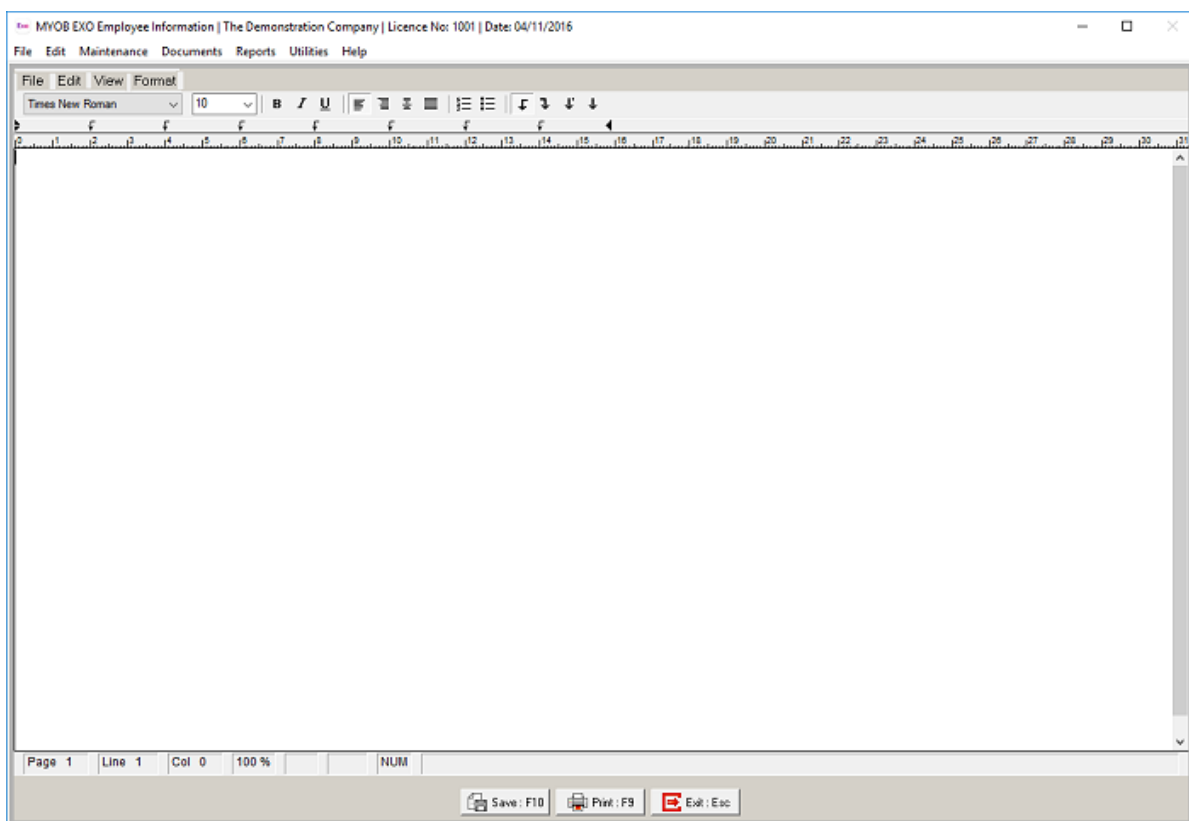
The word-processing interface in Exo Employee Information uses the RTF (Rich Text Format) standard. This means that plain text can be **bolded**, *italicized*, underlined and coloured, and text can be centred or right-aligned. The formatting functions are controlled by the toolbar buttons and the options in Format menu.

Once you have entered your document text, click the **Save** button then the **Exit** button. You will then be prompted to enter a name and description for the template:

Enter the name and a description for the document (for later reference), then click the **Save** button. Your template now appears in the Templates window.

Visitor Log

OSH Requires companies to keep an up-date visitor log, as this is part of the auditing procedure. You can set up multiple visitor logs to be printed out and filled in by visitors.

Select **Visitor Log** from the Documents menu. The Visitor Log window appears:

The Visitor Log has a pre-defined format, but you can customise the header note that appears at the top of the log. Edit the **Header Note** field if necessary, then click **Preview** to display a preview of the visitor log. From the preview screen, you can print out copies of the log for use.

If you require multiple visitor logs for different areas, click the **Add** button to create more logs, each with a different header note.

Reporting

Printing Reports

Selecting **Print Reports** from the Reports menu or clicking the Print Reports button on the toolbar opens the Select Report window.
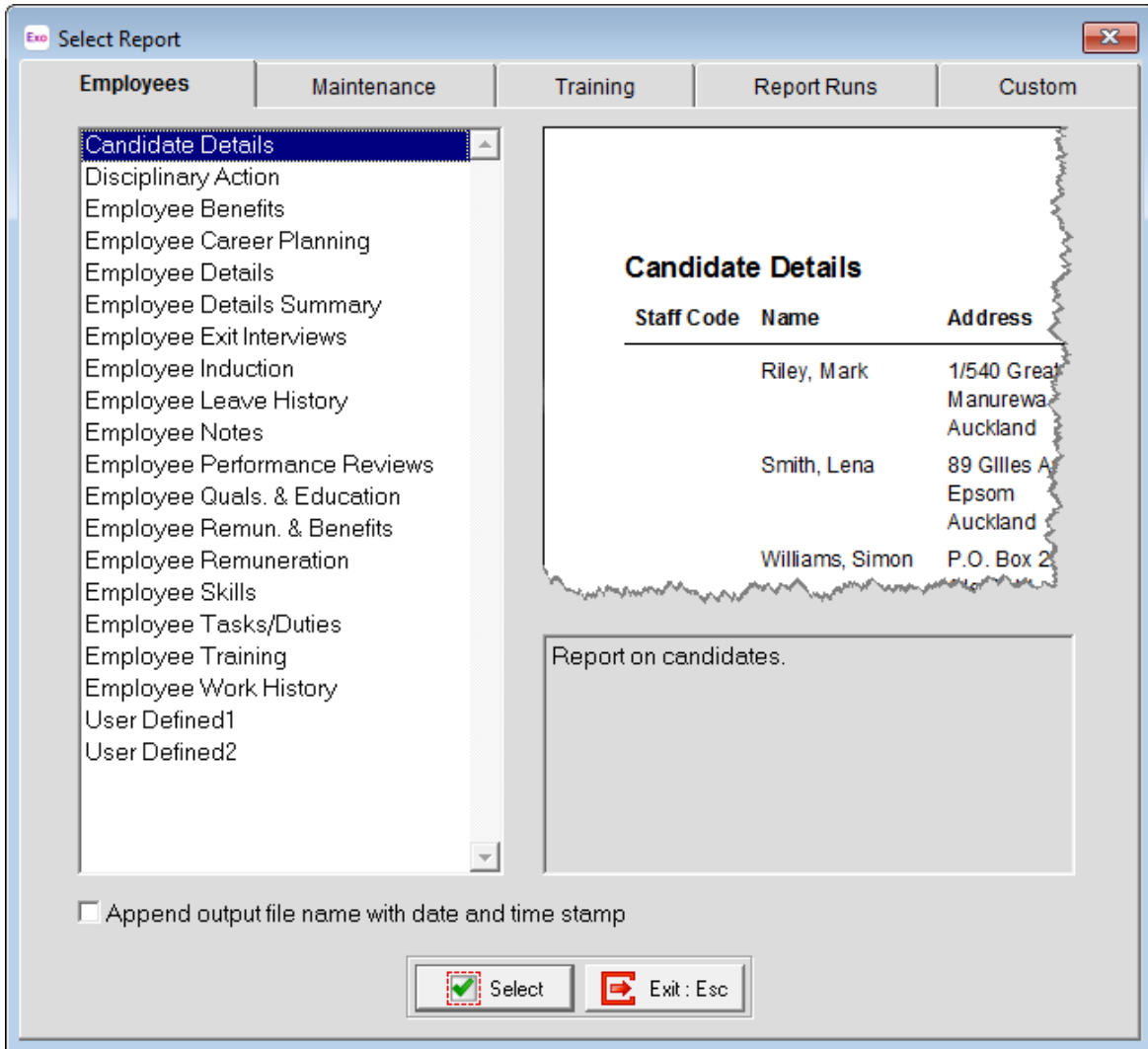
This screen shows the list of reports (see page 99) you can print information from, arranged into tabs. This also shows you what each report is used for.

Double-click on the report that you want to print or highlight it and click **Select**. This opens the Print Report options screen:

Reports can be printed in a variety of ways, depending on the options selected here.

Sort Orders

Sort Order 1 If a choice of primary sort order is available for a particular report, the first choice will be highlighted. The options in the list could include:

- Employee Code
- Employee Alpha
- Employee Group

Sort Order 2 If a secondary sort order is available, the first choice will be highlighted. This means that the Sort Order 2 option will only be available if you have something other than Employee Code or Alpha highlighted in Sort Order 1, e.g. Induction Plan. The options in the list could include:

- Employee Code
- Employee Alpha

Selection Ranges

Employee Code/Employee Alpha/Employee Group Code Enter values here if you want a report for a particular employee or range of employees. These fields validate that you have entered a correct code. To look up a list of employee codes, enter zero here.

Other reports have selection ranges specific to the information being reported on, e.g. Induction Plan, Note Type, Skill or Position. Enter values to restrict the report to a subset of these items.

Options

If the report has other options specific to that report (see page 101), these can be accessed by clicking the **Report Options** button.

Output Options

Destination Select where the report should be directed to. Choose from:

- Printer
- Screen
- File (PDF)
- CSV Output
- Excel Output (XLSX)

Printer This displays the name of the printer that you are printing to. Select the **Setup Print** option to display printing options before the report is printed; otherwise the report will be sent directly to the printer using the default options.

File Name This displays the name of the file that will be created when "File" or "CSV Output" are selected.

Number of copies The default number of copies is 1. Enter the number of copies you require.

Available Reports

MYOB Exo Employee Information's reports concern insurance providers requirements, OSH requirements, reminders and masterfile listings.

Employee Reports

Report	Content
Candidate Details	Lists all Candidates in the system, with key details.
Disciplinary Action	Lists all Disciplinary incidents by employee, with key details.
Employee Benefits	Lists all Benefits by employee, with key details.
Employee Career Planning	Lists all employees that have been assigned a Career Plan, including details of the Career Plans and Career Plan Goals in each plan.
Employee Details	Displays personal, contact and supervisor details for all selected employees.
Employee Details Summary	Displays summarised key details of all selected employees.
Employee Exit Interviews	Lists all employees that have been assigned an Exit Interview Plan, including details of the Exit Interview Plans and Exit Interview Points in each plan.
Employee Induction	Lists all employees that have been assigned an Induction Plan, including details of the Induction Plans and Induction Bullet Points in each plan.

Employee Leave History	Lists all Leave (Holiday Pay, Sick Pay, etc.) recorded for employees.
Employee Notes	Lists all Employee Notes recorded for employees.
Employee Performance Reviews	Lists all employees that have been assigned a Performance Review Plan, including details of the Performance Review Plans and Performance Review Points in each plan.
Employee Quals. & Education	Lists all Qualifications and Education by employee, with key details.
Employee Renum. & Benefits	Lists all remuneration changes and Benefits recorded for all employees, with key details.
Employee Remuneration	Lists all remuneration changes by employee, with key details.
Employee Skills	Lists the skills assigned to all selected employees.
Employee Tasks/Duties	Lists the tasks and duties assigned to all selected employees.
Employee Training	Lists the Training Courses assigned to all selected employees, with key details.
Employee Work History	Displays the Work History of all selected employees, showing any changes in Position.
User Defined1	Produces a report based on the user-defined fields set up for the User Defined1 button on the Other tab of the Employee Maintenance window.
User Defined2	Produces a report based on the user-defined fields set up for the User Defined2 button on the Other tab of the Employee Maintenance window.

Maintenance Reports

Report	Content
Employee Groups	Lists all Employee Groups, displaying a breakdown of their Codes.
Exit Interview Procedures	Lists all Exit Interview Points in the system.
Induction Plan	Prints out a copy of the selected Induction Plans.
Performance Reviews	Prints out a copy of the selected Performance Review Plans.
Positions	Lists all Positions in the system, with key details.

Skills by Employee Group	Lists all skills, sorted by the Employee Groups that they are allocated to.
Skills by Position	Lists all skills, sorted by the Positions that they are allocated to.
Skills by Skill	Lists all skills in alphabetical order.
Tasks/Duties by Employee Group	Lists all tasks/duties, sorted by the Employee Groups that they are allocated to.
Tasks/Duties by Position	Lists all tasks/duties, sorted by the Positions that they are allocated to.
Tasks/Duties by Tasks/Duties	Lists all tasks/duties in alphabetical order.
User Security	Lists all the users that have access to the system and the areas they can access.

Training Reports

Report	Content
Training Courses	Lists all Training Courses in the system, with key details.
Training Providers	Lists all Training Providers in the system, with key details.

Report Options

Many options are common throughout all of the reports. For example, **Detailed Report** means a line for each record that meets your criteria will be displayed. Options specific to individual reports are detailed below.

Employee Reports

Candidate Details

- Show employed candidates - select this option to include candidates who have since been employed by the organisation.

Disciplinary Action

- Show terminated employees - include ex-employees in the report.

Employee Benefits

- Show only current benefits - display only those benefits that currently apply to employees.
- Show only historical benefits - display only those benefits that no longer apply to employees.

Employee Career Planning

None.

Employee Details

- Show terminated employees - include ex-employees in the report.

Employee Details Summary

- Show terminated employees - include ex-employees in the report.

Employee Exit Interviews

- Show terminated employees - include ex-employees in the report.

Employee Induction

- Show only completed induction points - display only those Induction Plan Points that have been marked as completed.
- Show only completed induction points - display only those Induction Plan Points that have not yet been marked as completed.

Employee Leave History

- Show terminated employees - include ex-employees in the report.

Employee Notes

- Show terminated employees - include ex-employees in the report.

Employee Performance Reviews

None.

Employee Quals. & Education

None.

Employee Renum. & Benefits

None.

Employee Remuneration

- Show only salary remunerations - display only remuneration records that relate to salaries.
- Show only wages remunerations - display only remuneration records that relate to wages.

Employee Skills

None.

Employee Tasks/Duties

None.

Employee Training

- Show incomplete training only - display only training that has not yet been marked as complete.

Employee Work History

- Show terminated employees - include ex-employees in the report.

User Defined1

None.

User Defined2

None.

Maintenance Reports

Employee Groups

None.

Exit Interview Procedures

None.

Induction Plan

None.

Performance Reviews

- Print signature line - select this option to include a line for the employee to sign on at the end of each plan.

Positions

None.

Skills by Employee Group

None.

Skills by Position

None.

Skills by Skill

None.

Tasks/Duties by Employee Group

None.

Tasks/Duties by Position

None.

Tasks/Duties by Tasks/Duties

None.

User Security

None.

Training Reports

Training Courses

- Show User Defined… - specify whether or not to include each of the various fields set up on the User Defined tab of the Training Courses window.

Training Providers

None.

Report Runs

A report run is a way of grouping reports together to process several at a time. This saves the repetitive task of having to navigate to, set up, preview, and print the same reports from the Select Report screen every time you need them. When a report is in a run, it can be customised permanently for that run.

Report runs are set up and run from the Report Runs tab of the Select Report window (see page 97). Selecting **Report Runs** from the Reports menu opens the Select Report window with the Report Runs tab automatically selected:
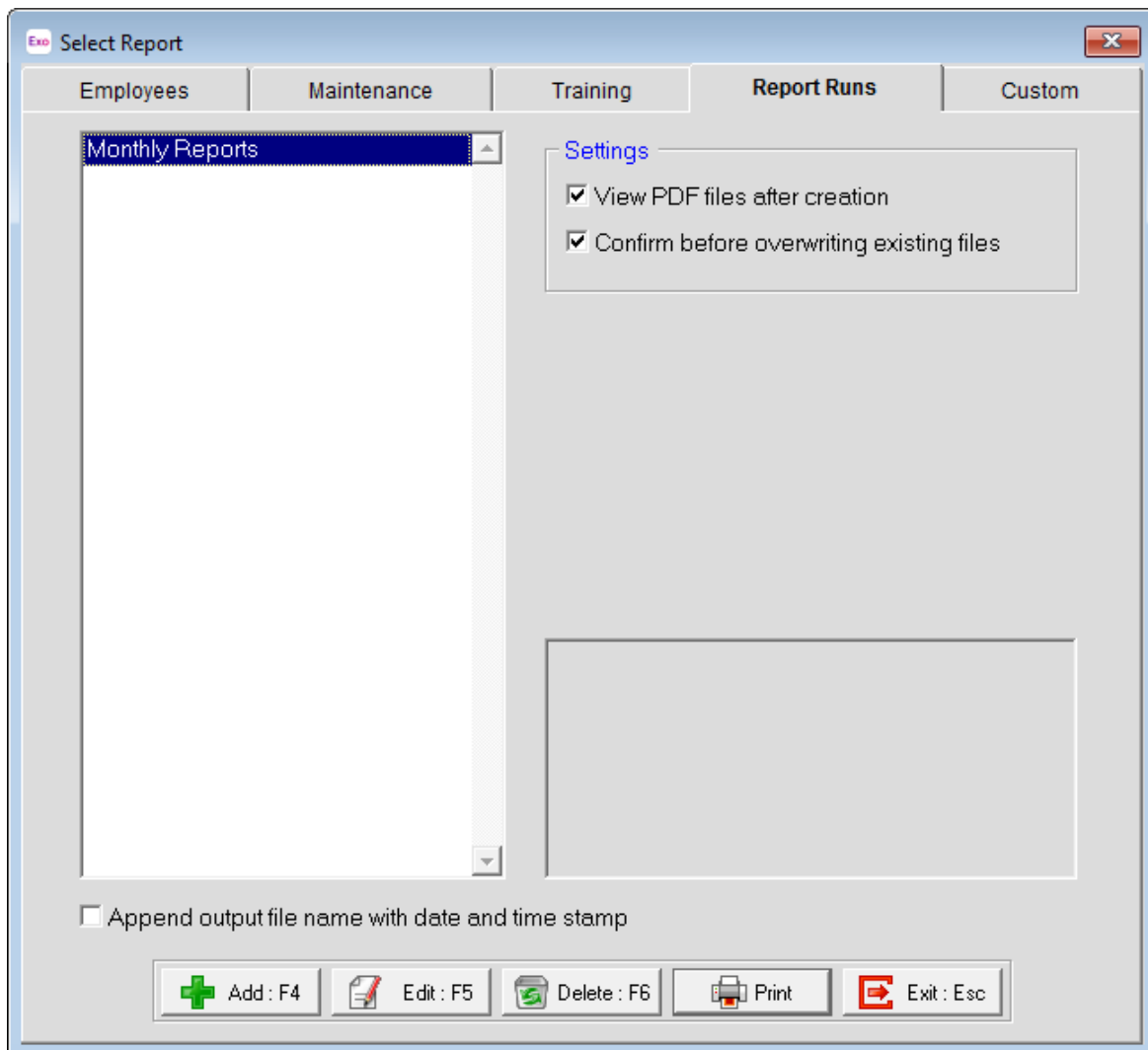
The following options are available on the Report Runs tab, which affect all reports generated from report runs:

- **View PDF files after creation** - if this option is ticked, PDF reports will be opened in your default PDF viewer application when they are created.
- **Confirm before overwriting existing files** - if this option is ticked, you will be asked for confirmation if any of the report files you are generating will overwrite an existing file. If it is not ticked, files will be overwritten automatically. This option is disabled if **Append output file name with date and time stamp** is ticked, as files will always be unique in this case.

Adding Report Runs

To add a Report Run:

1. Click **Add** or press F4. The Edit Report Run screen appears:
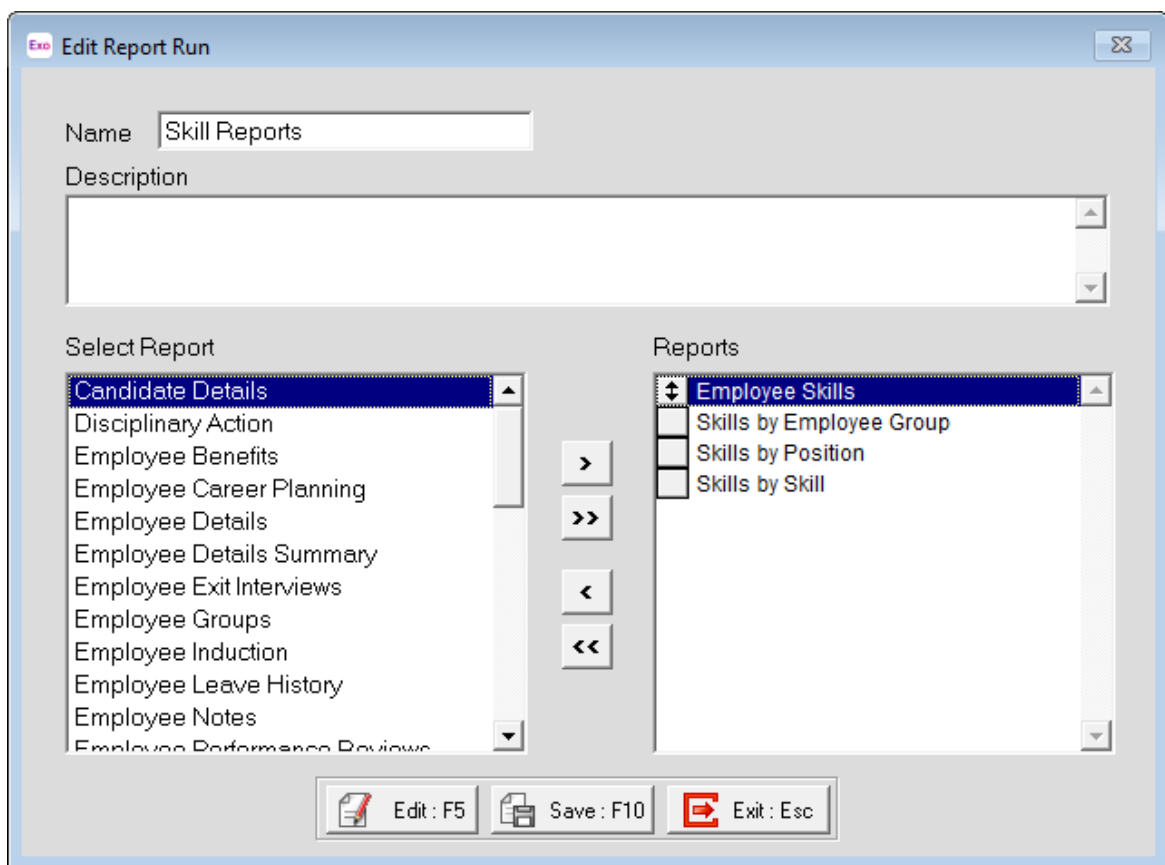
2. Enter a **Name** and **Description** for this report run.

3. From the **Select Report** window on the left, select any report for inclusion into the report run. Double-click on a report, or select the report and click the **>** button to move the selected report to the **Reports** window. Reports in the Reports window can be re-ordered by dragging them up and down.

4. Customise each report. You do not need to customise a report if the default settings suit you; however, it is a good idea to check how the current defaults.

   To customise a report, double-click on a report in the reports window, or select the report, then click **Edit** or press F5. The Print Report screen (see page 97) for that report appears.

   Enter values into the selection ranges to print for specific departments/cost centres as necessary.

Set the report destination for each report.

> **TIP:** This lets you send certain reports to go to certain printers. You can set all reports' destinations to "Screen" to preview each report before it goes to the printer.

You can set any number of options to do with what to show or what to hide on the report, choose between summary and detail view, or choose the page orientation.

5. Once you have finished customising the report, click **Save** or press F10 to permanently save your settings, then click on **Exit** or press ESC to return to the Edit Report Run screen.

   Click **Save** or press F10 to save the report run (and the reports in it) and return to the report run selection screen, from which you can proceed to print the run.

Editing Report Runs

You can select an existing report run on the Report Runs tab and click **Edit** or press F5 to add, remove or edit the reports in that report run.

Clicking **Delete** or pressing F6 removes the currently selected run from the report run list.

Printing Report Runs

Click **Print** on the Select Report screen to print the currently selected report run. All of the reports in the run are printed in one sequence.

ReportWriter

MYOB ReportWriter is a query and report writing tool that enables you to extract information from your MYOB system and format it into a variety of outputs including reports, spreadsheets, graphs, labels, and others. You can access ReportWriter from within Exo Employee Information by selecting **ReportWriter** from the Reports menu.

Help for the ReportWriter is available by pressing F1 while using it.

Utilities

Security Groups

Employees can be grouped into Security Groups, which are applied to individual users on the User Security window. This determines who is able to look at which employees' data, enabling security to be self-contained to one or many sets of employees per user.

To set up Security Groups, select **Security Groups** from the Utilities menu A list of the currently available groups appears. Click **Add** to create a new group, or highlight an existing group and click **Select** to edit it. Security Groups are added and edited on the following window:
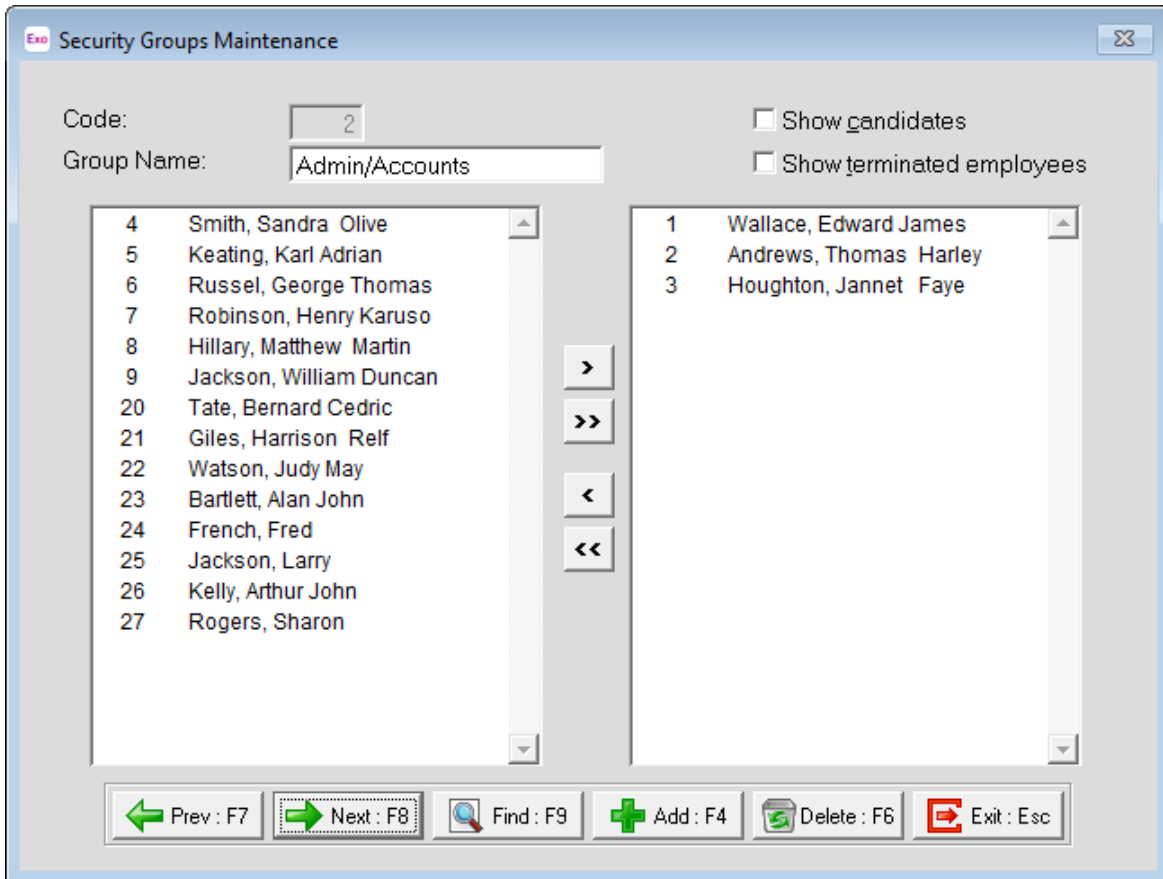
All available employees are listed on the left; all employees that the current user is allowed to access are listed on the right. You can click on items and drag them from one list to the other.

> Moves the selected employee to the list on the right.

>> Moves all employees to the list on the right.

< Moves the selected employee from the list on the right back to the main list on the left.

<< Moves all employees from the list on the right back to the main list on the left.

Event Log

MYOB Exo Employee Information can be set up to keep a log of the following events:

- When an employee record is added, edited or deleted.
- When a Disciplinary Action is added, edited or deleted.
- When a Performance Review is added, edited or deleted.

Setting up Event Tracking

To specify what events should be tracked in the Event Log, select **Event Tracking** from the Utilities menu. The Event Tracking window appears:
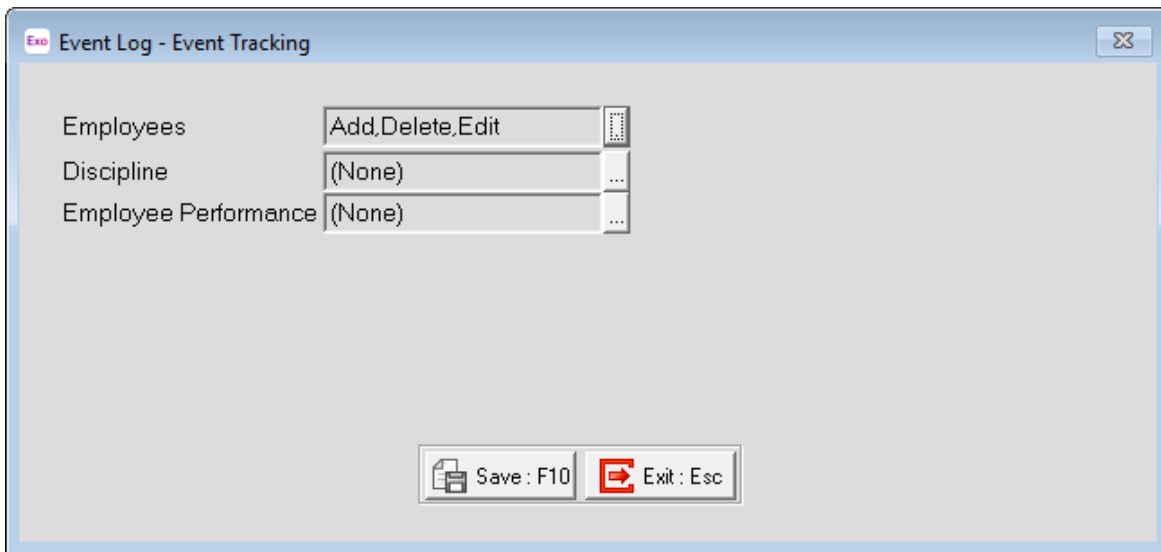

This window display which events are being tracked for each type of item. To alter the events being tracked for an item, click the [...] button next to that item. This opens the Track Changes window:
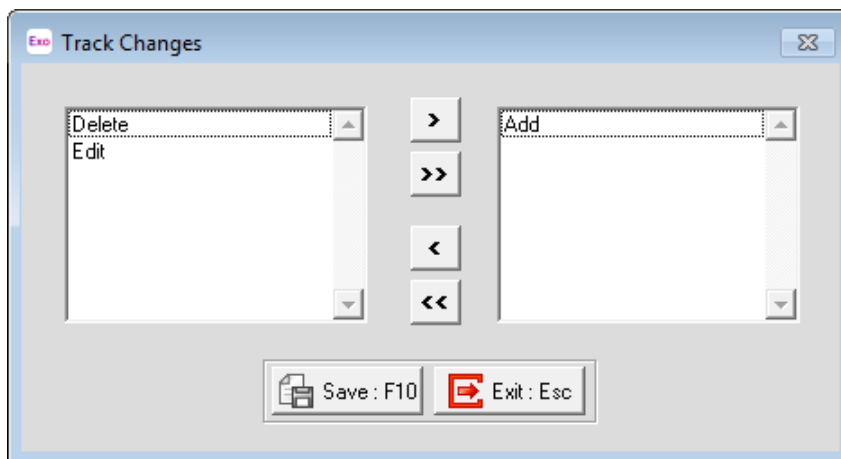
Events listed on the left are not tracked in the Event Log; events listed on the right are tracked. Select an event and click the **>** button to add it to the list of tracked events on the right. Select a tracked event and click the **<** button to remove it from the list of events being tracked. The **>>** and **<<** buttons move all events from one list to the other. Click **Save** when you are done.

Viewing the Event Log

Once Event Tracking has been set up, records are automatically inserted into the Event Log. To view the Event Log, select **Event Log** from the Utilities menu.
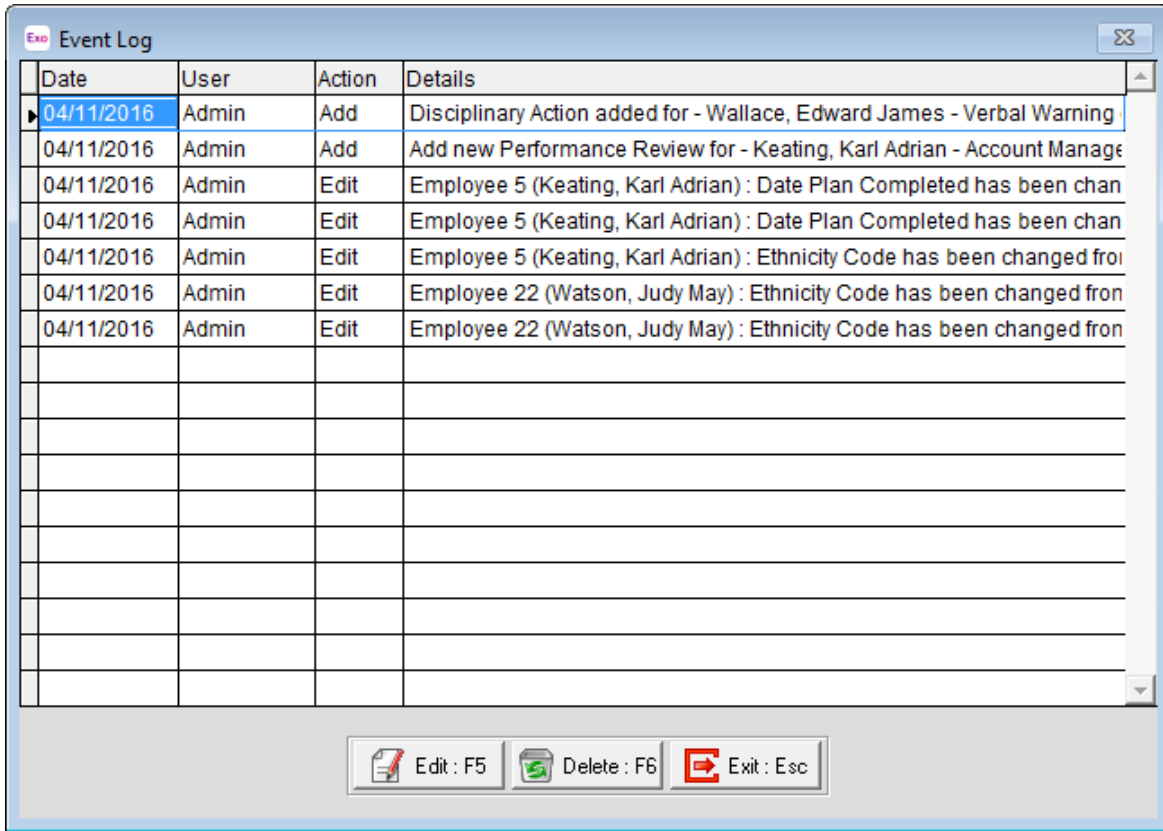
Select an item and click **Edit** to see a summary of the event. For Edit events, a comparison between the old value and the new value is available.

Select an item and click **Delete** to remove it from the log.

Upgrading

You can upgrade your current version of MYOB software by selecting **Upgrade Software** from the Help menu.

> **NOTE:** If several users are operating MYOB software across a network, they all must exit their MYOB software before you start the upgrade process.

Selecting this option opens the Upgrade Software window:
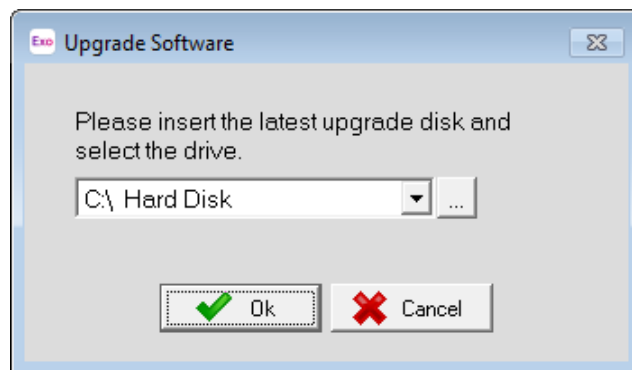
Either:

- Use the combo box to select the disk drive holding your MYOB CD.

- Click the [...] button to specify the location of the upgrade program (**upgrades.exe**), which can be stored on a file server, and run from that location on the server.

Once you have selected the location of the upgrade, you will be exited from your MYOB software, for the upgrade process to begin. Follow all onscreen prompts to complete the upgrade of the Exo Employee Information software. A restart may be required. After the restart, open Exo Employee Information in the normal way. If a restart is not required, Exo Employee Information is started automatically following the upgrade.

When you restart Exo Employee Information, the upgrade process for your company files will begin automatically. The Upgrade Software window appears, prompting you to specify which companies you want to back up during the upgrade process.
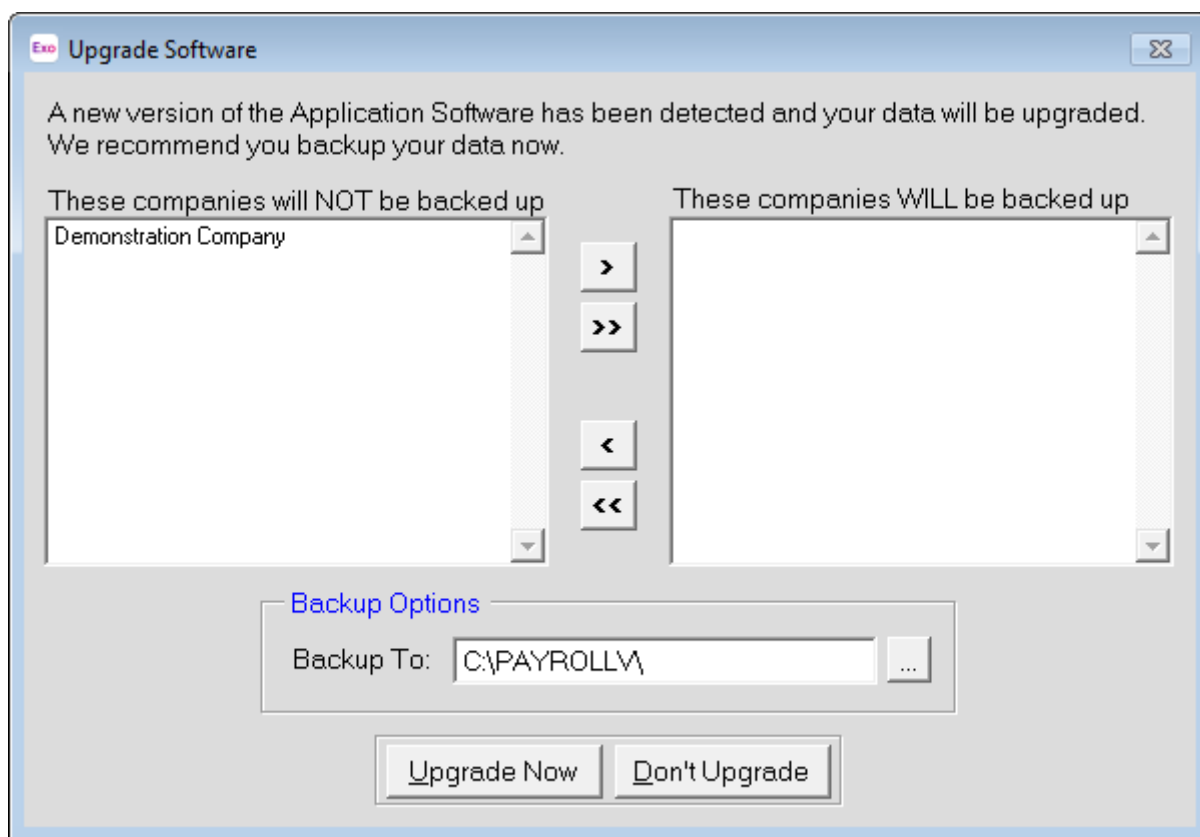
Select which companies you want to back up and click the **>** button to move them to the list on the right. During the upgrade, a backup will be made for each company listed on the right of the screen.

If you chose to back up your companies, the backup is performed before that company's data is upgraded. As each company is upgraded, the names of the files being upgraded are displayed in the top right corner of the screen. **Do not interrupt this process. It may take several minutes.**

You may be prompted to "Convert 3.0 resource file to 6.0 format". Click **Yes**.

Once the upgrade process has finished, you will be returned to the company selection window. You can now continue using the software in the normal way.
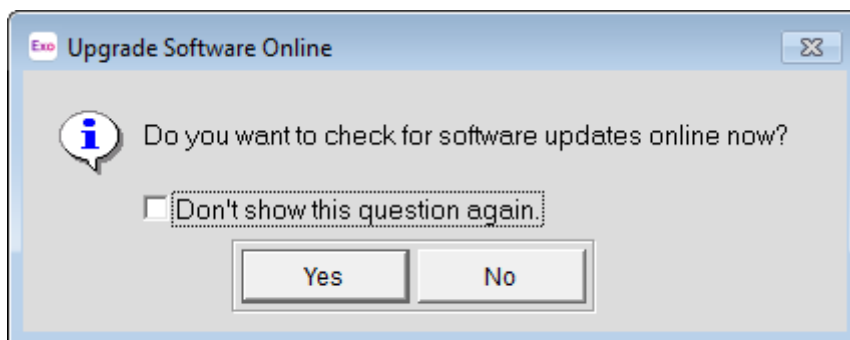
Upgrading Software Online

From within Exo Employee Information you can check if any updates are available online, and if so, download and install them immediately. Select Upgrade Software Online from the Help menu. The following window is displayed:
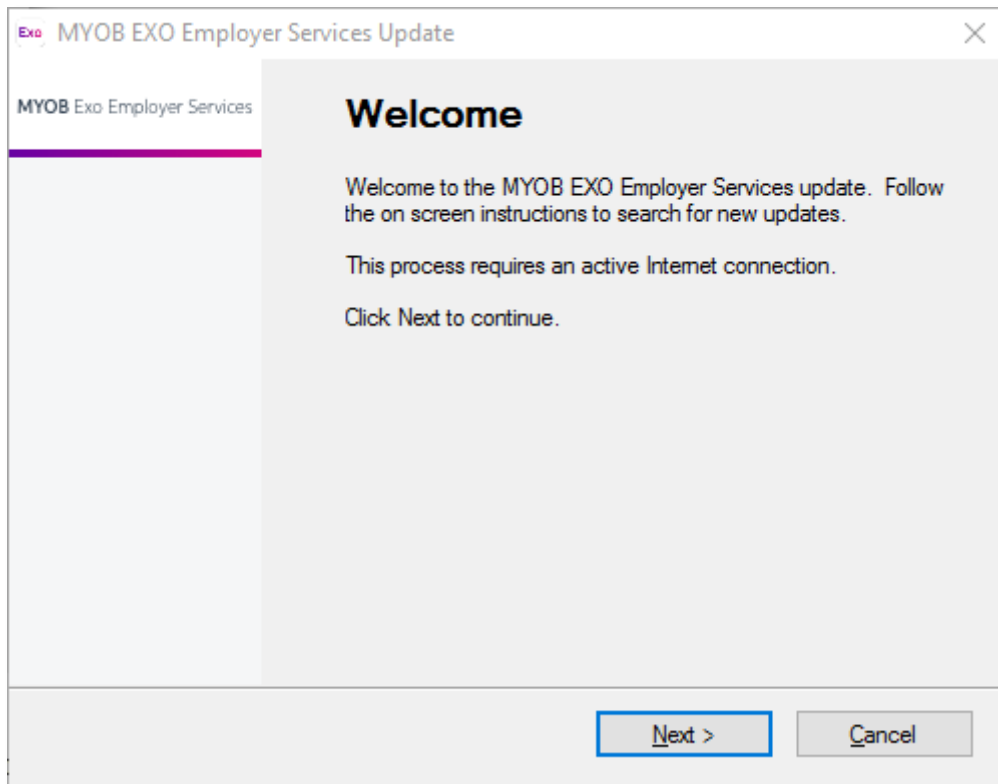
Follow the onscreen instructions to update your software online.

If you haven't updated your software for a while, a window will be displayed to remind you to check for updates when you exit out of the software:

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