# MYOB EXO Employer Services NZ Edition 2015.02 Release Notes



# Contents

Introduction	1
What's New in this Release?	1
Installation	2
Pre-Install Requirements	2
Installing MYOB EXO Employer Services	2
Post-Installation	2
New Features	3
Changes to EXO Health and Safety	3
Updates to Safety Equipment Management	3
Updates to Document Management	8
Supervisor Details	10
Updates to Hazards	11
Updates to Incidents	11
Updates to Job Requirements	12
Updates to Notes	12
Reporting Updates	12
Updates to the Custom Payslip	15
Backing up the Custom Payslip	16
Previewing Payslips	17
Distributing Reports	
General Reporting Updates	19
New Look Reports	19
New Select Report Window	19
AccountRight Live General Ledger Export	20

Toolbar Customisation	
Changes to Backup Options	21
Backup File Names	21
Installing MyStaffInfo	22
Resolved Issues	23
Known Issues	25

# Introduction

### What's New in this Release?

The focus of the 2015.02 release is on providing significant updates to the EXO Health and Safety module. This release also features changes to reporting in EXO Payroll (including updates to the Custom Payslip), the ability to export the General Ledger to MYOB AccountRight Live and general improvements to the backup process.

The purpose of this document is to provide essential information on the installation and use of this release:

- The **Installation** section provides an overview of the installation process, including pre-installation requirements and post installation steps.
- The **New Features** section describes all new features introduced in this release.
- The **Resolved Issues** section describes all issues that have been addressed by this release.
- The **Known Issues** section details any issues in this release that have been identified as requiring attention.

**Need assistance?** If you have any questions or you need assistance with installing this update, contact MYOB EXO Support from 8:30AM to 5.00PM, Monday to Friday on 0800 MYOB EXO (0800 696 239) or via e-mail at <u>anzpayrollsupport@myob.com</u>.

# Installation

### **Pre-Install Requirements**

Requirements for PCs running MYOB EXO Employer Services components are detailed in the Minimum System Requirements document, available on the <u>MYOB website</u>.

### Installing MYOB EXO Employer Services

Information on installing and upgrading MYOB EXO Employer Services is maintained on the MYOB Enterprise Knowledgebase. See the following articles:

- Upgrading MYOB EXO Employer Services Online
- Upgrading MYOB EXO Employer Services Manually (New Zealand)
- How do I run Network.exe?

**Note:** Check the Known Issues section on page 25 for any known installation issues.

### **Post-Installation**

After the installation is complete, the version numbers of all MYOB EXO Employer Services applications should be as follows:

Application	Version
MYOB EXO Employer Services	2015.02
MYOB EXO Payroll (NZ)	2015.02
MYOB EXO Health and Safety	2015.02
MYOB EXO Employee Information	2015.02
MYOB EXO Time and Attendance	2015.02
Runtime Files	09.00.0000.7423

To ensure that this release installed successfully, check that the versions displayed on the About window (**Help menu > About**) match the versions listed here.

### Changes to EXO Health and Safety

This release introduces a range of new features and updates to the EXO Health and Safety module.

Updates to Safety Equipment Management

This release includes a number of changes to the way items of safety equipment are managed in EXO Health and Safety.

#### Safety Equipment Maintenance

The Details tab of the Safety Equipment Item Maintenance window now lets you select a frequency for item review and replacement, and lets you set reminders for both. You can also now attach a picture of the item.

Safety Equipment Item Maintenance	8				
Details Employee Assignment Notes					
Equipment Code: 2 Name	ne: Protective Eyewear 🐼				
Equipment Information Task: Welding & Machining					
Review Frequency:     3 · Mo       Replacement Frequency:     0 · Mo	tonths ▼ Reminder Prior: 1 ▼ Weeks ▼ ▼ Reminder Prior: 2 ÷ Weeks ▼				
Equipment Description:	Picture				
Clear plastic glasses that wrap around the he	Insert picture file here				
Maintenance Advice:					
Check for severe scratching. Replace where	insert File				
🔶 Prev : F7 📄 Next : F8 🔍 F	Find : F9 🛛 📫 Add : F4 🛛 🛜 Delete : F6 🛛 💽 Exit : Esc				

The Employee Link tab has been renamed to Employee Assignment, and displays a list of all employees that the item of equipment has been assigned to:

📕 Saf	ety Equipm	nent Item Mainte	nance					23
	Deta	iils		Employee As	ssignment		Notes	
E	Equipment Code: 2 Name: Protective Eyewear Employee Links							
	Code	Employee Name			Issue Date	Review Date ≜	Replace Date	<u> </u>
	6	Keating, Karl Ad George, Thomas	rian Russell		27/08/2015 27/08/2015	27/11/2015 27/11/2015		
	Pr	<u>A</u> dd	ext : F8	dit <u>R</u> emo	ve Re <u>v</u> iev	Replace	Exit : Esc	

Clicking **Add** opens a new window where the employees to be assigned the equipment can be selected:

Selec	st All					
Sele	ct Code ∧	Alpha Code	Name	Occupation	Risk Area	
Γ	1	WALLACE	Wallace, Edward James	5 - Salesman	14 - Akid/Sales	
	2	ANDREWS	Andrews, Thomas Harley	6 - Storeman	15 - Akld/Packaging	
	3	HOUGHTON	Houghton, Jannet Faye	4 - Receptionist	12 - Akld/Reception	
	4	SMITH	Smith, Sandra Olive	4 - Receptionist	22 - Ham/Reception	
	7	KARUSO	Karuso, Robinson Henry	6 - Storeman	15 - Akld/Packaging	
	8	HILLARY	Hillary, Matthew Martin	1 - Clerk	21 - Ham/Office	
	9	JACKSON	Jackson, William Duncan	2 - Driver	16 - Akld/Delivery	
	20	TATE	Tate, Bernard Cedric	3 - Manager	11 - Akld/Office	
	21	GILES	Giles, Harrison Relf	3 - Manager	21 - Ham/Office	
	22	WATSON	Watson, Judy May	3 - Manager	24 - Ham/Sales	

Clicking **Edit** opens a new window that allows you to edit the dates for each item on a per employee basis:

📕 Safety Equipment		23						
Safety Equipment		Notes						
Equipment Information								
Staff Code: 5	Keating, Karl A	Adrian						
Equipment Code: 2	Protective Ey	/ewear						
Equipment Description:	Maintenance A	Advice:						
Clear plastic glasses that wrap around the head Check for severe scratching. Replace where needed								
Equipment Issue Date: 27/08/2015	-							
Review Frequency: 3 + M	lonths 💌							
Replacement Frequency: 0 🛨	•							
- Review		eplacement						
Review Due: 27/11/2015 -	Rep	placement Due: 📝						
Reminder Prior: 1 🕂 Weeks	- Rer	minder Prior: 2 🗧 Weeks 💌						
Reminder Date: 20/11/2015	Rer	minder Date: //						
Review		Replace						
E sa	Exit : Esc							

The issue date, review and replacement dates, and review and replacement frequencies can all be set for each individual item assigned to each employee.

Review and replacement dates can be rolled over for the item—the Employee Assignment tab also has **Review** and **Replace** buttons that let you roll over the dates for the selected employee.

**Note:** You cannot roll over a review or replacement date that is more than one month away.

Notes are automatically generated when an item is reviewed or replaced. These notes can be viewed and edited on the Notes tab of the Safety Equipment window.

#### **Employee Maintenance**

A new **Safety Equipment** button is available on the Other tab of the Employee Maintenance window:

Employee Maintenance			23
Employee Details	Contact Details	Notes Other Document	ts
Employee Code: 1	First Name: Edward James	Last Name: Wallace	
	Job Requirements	Incidents Hazard Training	
Safety Equipment			

Clicking this button opens a new window showing the items of equipment assigned to the employee:

Safety Equipment - Wallace,Edward James								
Equipment Name	Issue Date	Review Date	Replace Date					
Desk Armrest	21/07/2015	21/07/2016	11					
Safety Helmets	11/09/2015	11/12/2015	11/09/2017					
				.				
				-				
📫 Add : F4 🛛 🛃 Edit : F5 🛛 🗑 Remove : F6	<u>R</u> eview	Replace	Exit : Es	c				
· · · · ·		,	-1.					

The **Add** and **Edit** buttons let you assign new items of equipment to the employee and edit their details using the new Safety Equipment window (see page 5).

The **Review** and **Replace** buttons roll over the **Review Date** or **Replace Date** for the selected item.

#### Safety Equipment Issue Overview

The release adds a new overview window that shows all items of safety equipment that have been issued to employees, and allows you to edit individual item assignments and perform bulk actions on multiple items at once:

	Safety Equipment										
F	ilters	Show All 🔹	Equip	ment: All	Occupation	on: All	▼ R	isk Area: 🛛 🗛		•	Clear <u>F</u> ilters
	Review All Replace All Remove All										
	Code	Employee Name	Equipment Name	Occupation	Risk Area	Issue Date	Review Due	Replace Due	Review	Replace	Remove
Þ	4	Smith, Sandra Olive	Desk Armrest	Receptionist	Ham/Reception	11	11	11			
	6	George, Thomas Russell	Safety Helmets	Clerk	Ham/Office	05/04/2015	05/07/2015	05/04/2017			
	5	Keating, Karl Adrian	Protective Eyewear	Storeman	Akld/Packaging	27/08/2015	27/11/2015	11			
	6	George, Thomas Russell	Protective Eyewear	Clerk	Ham/Office	27/08/2015	27/11/2015	11			
	5	Keating, Karl Adrian	Safety Helmets	Storeman	Akld/Packaging	02/09/2015	02/12/2015	02/09/2017			
	7	Karuso, Robinson Henry	Safety Helmets	Storeman	Akld/Packaging	02/09/2015	02/12/2015	02/09/2017			
	1	Wallace, Edward James	Safety Helmets	Salesman	Akid/Sales	11/09/2015	11/12/2015	11/09/2017			
	3	Houghton, Jannet Faye	Safety Helmets	Receptionist	Akld/Reception	11/09/2015	11/12/2015	11/09/2017			
	4	Smith, Sandra Olive	Safety Helmets	Receptionist	Ham/Reception	11/09/2015	11/12/2015	11/09/2017			
	1	Wallace, Edward James	Desk Armrest	Salesman	Akid/Sales	21/07/2015	21/07/2016	11			
	3	Houghton, Jannet Faye	Desk Armrest	Receptionist	Akld/Reception	21/07/2015	21/07/2016	11			
	8	Hillary, Matthew Martin	Desk Armrest	Clerk	Ham/Office	21/07/2015	21/07/2016	11			
	20	Tate, Bernard Cedric	Desk Armrest	Manager	Akld/Office	23/08/2015	23/08/2016	11			
Π	21	Giles, Harrison Relf	Desk Armrest	Manager	Ham/Office	23/08/2015	23/08/2016	11			
Π	22	Watson, Judy May	Desk Armrest	Manager	Ham/Sales	23/08/2015	23/08/2016	11			
Π	9	Jackson, William Duncan	Desk Armrest	Driver	Akld/Delivery	08/09/2015	08/09/2016	11			
П											
Π											
		4	🛛 Add : F4 🛛 😭 Edit : F9	5 SRemove : F	F6 Process All	Cop	y 📄 💽 E	Exit : Esc			

The Safety Equipment Issue Overview window can be opened from the Maintenance window, or by clicking the new 🦲 toolbar button.

As this window displays all items assigned to all employees, the list can be very long the controls at the top of the window can be used to filter the list to a more manageable subset of items.

On this window you can:

- Click Add to add new item/employee assignments. You will be asked to select a safety equipment item, then select employees to assign it to using the new Select Employee window (see page 4).
- Click **Edit** to edit the details of individual items using the new Safety Equipment window (see page 5).
- Tick the **Review**, **Replace** and/or **Remove** boxes for multiple rows (or tick the **Review All**, **Replace All** or **Remove All** boxes at the top of the window), then click **Process All** to perform all actions in one operation.

**Note:** You cannot roll over a review or replacement date that is more than one month away. When ticking the **Review All** or **Replace All** boxes, any rows that cannot be rolled over will not be selected—a message box will appear to inform you if this is the case.

#### Updates to Document Management

#### Employee Documents

A new Documents tab has been added to the Employee Maintenance window:

Name	Category	Description	File Name	Date Modified
FIRST AID TRAINING	Certification	Certificate from First Aid	FIRST AID TRAINING CERTIFICATE.F	PD 23/04/2013
NCIDENT REPORT 31	Incident	Report of incient involvin	INCIDENT REPORT 31-7-2015.PDF	31/07/2015
				Þ
	٨.٢٠	E da	Delete Deen Deerrent	1
	Add	Edit	Delete Open Document	

This tab is largely the same as the existing Documents tab in the EXO Employee Information module; it lets you attach external documents to an employee's record.

Click **Add** to browse for a document to attach to the employee's record. You can enter a name, category and description for the document:

Add Document		23
Name:	FIRST AID TRAINING CERTIFICATE.PDF	
Category:	Certification	•
Description:	Certificate from First Aid training course	×
File Name:	FIRST AID TRAINING CERTIFICATE.PDF	_
Date Modified:	23/04/2013	
	📑 Save : F10 💽 Exit : Esc	

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

Files attached to employees are included in company backups if the **Include Employee Documents?** option is ticked on the Backup Options window (see page 21).

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.

#### **Company Documents**

The **Company Documents** item in the Documents menu opens the new Company Documents window, which allows you to attach documents relating to health and safety in general:

Company Documents				8
Name ▲	Category	Description	File Name	Date Modified
ACCIDENT RECORDS.DOCX	Misc		ACCIDENT RECORDS.DOCX	11/08/2015
MYOB_HEALTH_SAFETY_US	Guides	User Guide	MYOB_HEALTH_SAFETY_USER_GUIDE.PDF	27/01/2015
WORKSAFE POLICY.PDF	Policy documents	Company Worksafe policy	WORKSAFE POLICY.PDF	16/07/2012
_				
-				
4				
	📕 Add		en Document	

The functions available on this window are the same as those available on the new Documents tab (see page 8). All files attached using this window are copied to the **Database\companyfiles** folder under the default Employer Services folder (usually **Payrollv**).

**Note:** The ability to create documents using a built-in word processor is no longer available. Any documents created in previous versions will be listed on the new Company Documents window, where they can be opened and edited using the default editor for the type of file.

#### Effects on EXO Employee Information

Some of the changes to documentation management affect the EXO Employee Information module as well. The **Company Documents** menu option and Company Documents window are also available in EXO Employee Information. The built-in word processor is still available for creating new documents for employee and candidate records in EXO Employee Information.

The **Include Company Documents?** backup option applies to documents added via the Company Documents window in EXO Employee Information as well as EXO Health and Safety.

#### **Document Backups**

An option to back up company documents has been added to the Backup Options window in all EXO Employer Services modules—see "Changes to Backup Options" on page 21.

The existing **Include Employee Documents?** backup option now applies to documents added to employee records in EXO Health and Safety as well as in EXO Employee Information.

#### Supervisor Details

Contact details for each employee's supervisor are now displayed on the Contact Details tab of the Employee Maintenance window:

Employee Det	ails Contact Details	Notes	Other	Documents	
Employee Code	1 First Name: Edward James	Le	ast Name:   Wallace		
Residential (	Contact Details	Postal Con	ntact Details:		
Address:		Address:	23 Fleet Street		
Suburb:		Suburb:	Rosedale		
City:		City:	Auckland		
Phone:	236-6987				
	Contact				
Name:	Anne Marie Wallace				
Address:	23 Fleet Street	Suburb:	Rosedale		
City:	Auckland	Phone:	236-6987		
	afety Coordinator:				
Name:	Bernard Tate				
Position:	Manager	Phone:	09 236 6987		
	)etails:				
Supervisor:	Judy May Watson				
Email:	judy@demonstration.co.nz				
Phone:	09 306 4005				
4	- Prou: E7   - Novi : E9   [ ] Find : E9	Add 54	🕜 Dalata de 🖉 🗖 Estas	Feel	

**Note:** Employees' supervisor details are shared with the EXO Employee Information module, if it is also installed. Editing supervisor details in one module will update them in the other.

#### Updates to Hazards

The Hazard Maintenance window has been updated as follows:

- The Action proposed field on the Details tab is now compulsory.
- The Risk Score tab has been renamed to Risk Analysis.
- The **Frequency** dropdown on the Monitoring tab and the **Hazard Training reviewed?** dropdown on the Hazard Training tab both now include the option "Every 2 Years".

#### Updates to Incidents

The Incident Register window has been updated as follows:

- Two new options have been added to the **Type** dropdown on the Incident tab: Non-Serious Harm and Serious Harm.
- A new **Incident Number (Worksafe)** field has been added to the Incident tab. Incidents that are classed as Serious Harm are assigned an incident number by Worksafe.
- A link to the online version of the Worksafe Serious Harm Notification form has been added to the bottom of all tabs, along with the contact phone number for Worksafe.

📕 Incident Register		X						
Incident Injury Loo	tion/Treatment Investigation	Action Costs Notes						
Incident Code: 5	Employee: 7Robinson H	Henry Karuso						
Type: Serious Harm	Type: Serious Harm ▼ Date: 17/04/2015 ▼ Time: \$:45 AM Shift: Day ▼ Incident Number (Worksafe):							
what were you doing imr	ediately before the incident?							
Binding boxes with the wra	oping machine. (Nylon strapping)							
Describe what happened								
Received a mild electric s	ock from the metal surface of the machin	e.						
Cause								
Incident Mechanism	Heat radiation or energy	<b>•</b>						
	Contact with electricity	<b>•</b>						
Agency of Incident	Machinery and (mainly) fixed plant	-						
Filling, bottling and packaging equipment								
Link to online form: http://www.dol.govt.nz/Tools/Accident/Home/SeriousHarmNotification WORKSAFE New Zealand: 0800 030 040								
Prev : F7 📥 Nex	Prev : F7 Avext : F8 Sind : F9 Bave : F10 Cancel Exit : Esc							

#### Updates to Job Requirements

The Job Requirement Maintenance window has been updated as follows:

• The **Frequency** dropdown on the Details tab now includes the option "Every 2 Years".

#### Updates to Notes

When adding a Note to an employee record in EXO Health and Safety, all Note Types are available for selection, where previously, only the "General" type was available.

In addition, when creating Note Types in EXO Health and Safety, Note Type codes can now be up to six characters long, making them consistent with the rest of the EXO Employer Services system.

#### Reporting Updates

This release includes updated to a number of the reports available in EXO Health and Safety, in addition to the new look that has been applied to all EXO Employer Services reports (see page 19).

#### Accident Reports

Several updates have been made to the accident reports in EXO Health and Safety. The OSH tab on the Select Report window has been renamed to Forms. The OSH Accident Investigation report is now the Accident Investigation report:

Accident Investigation Email: seriousham.notifcation@worksafe.govt.nzFax: 0998 Phone: 0800 030 040 Post: The Registrar, WorkSafe NZ, PO	4 4115 Box 105-146, Auckland 1143
NAME OF ORGANISATION Demonstration Company	BRANCH/ DEPARTMENT Ham/Office
PARTICULARS OF ACCIDENT Date of accident 06/04/2015 Time 3:30 PM (M) T W T F S S	Location Outside entrance to Central Park in Date reported 12/08/2015 Penrose, going North though the lights.
THE INJURED PERSON	
Name Andrews, Thomas Harley	Address 65a George Street
Age 23.6 Phone number 303-6987	Parnell Auckland 1023
Date of accident 06/04/2015	Length of employment - at plant on job 27 months
	nitrod part of body

The OSH Notice of Accident report is now the Notice of Serious Harm report:

Notice or record of accident/serious harm Email: seriousham.notifcation@worksafe.govt.nz Fax: 09 984 4115 Phone: 0800 030 040 Post: The Registrar, WorkSafe NZ, PO Box 105-146,	Auckland 1143		
1 Particulars of employer: (Business name and address)	9 Agency of accident / serious harm:		
Demonstration Company	Machinery or (mainly) fixed plant		
PO Box 1234	Mobile plant or transport		
	Powered equipment, tools or appliances		
Auckland	Non-powered handtools, appliances and equipment		
2 Location of place of work:	Chemical or chemical products		
PO Box 1234	Material or substance		
	🗸 Environmental agency		
Auckland	Animal, human or biological agency (not bacteria or virus)		
Shop, shed, unit no, floor, building; Street no and name; Locality / suburb	Bacterial or virus		
3 Personal data of injured person:	10 Body part:		
Namo	Head Neck Trunk		
No.	Lower limbs Multiple location		

#### Induction Report

A sign off area has been added to the following reports:

- Induction Plan, which is available from the Maintenance tab of the Select Report window or from the Induction Plan Maintenance window.
- Employee Induction, which is available from the Employees tab of the Select Report window or when adding an induction to an employee's record.

mployee Induction	
	Completed
Wallace, Edward James First Aid Introduction The following steps are required to be followed before employee is on dut	by:
<u>Occupational Overuse</u> Employee knows what is the occupational overuse in his/her position	and the ways to prevent it.
<ul> <li><u>Video - First Aid</u> Training video on dealing with minor injurys and using items in first aid</li> </ul>	d pack.
Where to Get Help     Employee knows where to get help in certain situations.	
Signed (Employee):	Dated:
Signed (Supervisor)	Dated:

**Note:** These reports are also available in EXO Employee Information.

#### Hazard Training Sheet Report

The Hazard Training Sheet report now includes Risk Area Code as one of the available Selection Ranges.

#### Safety Equipment Report

The new Safety Equipment report is available on the Maintenance tab of the Select Report window. It displays details of all safety equipment items recorded in the system:

	Printed on: 03 September 2015 10:41:26		
	Demonstration Company Page: 1		
Safety Equipment			
1 Safety Helmets			
Description:	NZSA approved safety helmets		
Task:	In Warehouse		
Review frequency:	3 Months		
Replacement frequency:	2 Years		
Maintenance:	Check strapping. Look for cracks or weakness on plastic. Replace after two years.		
2 Protective Eyewear			
Description:	Clear plastic glasses that wrap around the head		
Task:	Welding & Machining		
Review frequency:	3 Months		
	Oberlafer enverse erretebier - Deelees where envelop		

#### Equipment Issue Report

Extra report options have been added to the Equipment Issue report, which allow users to filter the reported data in more ways:

Print Report - Equipment Iss	ue Report	×
Sort Order 1: Employ	ee Code 🔹 Sort Order 2: Employee Code 💌	
<u>Selection Ranges:</u> Issue Date	From:To:Options: /// Report Options	
Employee Code		
Employee Alpha		
Risk Area Code		
Occupation Code		
Equipment Alpha		
Review Due		
Replace Due		
- Output Options:		
Destination: Printer	Printer: Adobe PDF	
Number of Copies:	Setup Printer	
	Print 🔄 Save : F10 💽 Exit : Esc	

### Updates to the Custom Payslip

This release adds options to the custom payslip report. You can now set up three different custom payslips in the following layouts:

- A4 (210mm x 297mm)
- A5 (148mm x 210mm)
- MYOB A4 Security

The new **Payslip layout** option on the Payslip Setup window lets you specify which layout to edit when you click the **Modify Payslip** or **Reset Payslip** button:

Payslip Setup	23
Custom payslip setup options	
Enable custom payslip report I Hide other payslip reports	
Payslip layout:	
© A4-210×297	
C A5-148×210	
C MYOB A4 Security	
Modify Payslip Reset Payslip	
Payslip logo:	
MNOR	
MITOB	
C\PAYROL~2\payslip_logo.bmp Change Logo Im	age
Note: Payslip logo image file must be in BMP format.	
😭 Save : F10 💽 Exit : Esc	

**Note:** If you have made changes to the existing A4 template, you will need to reset it and re-apply your customisations to enable the new features introduced in this release.

When printing the Payslip Custom report, you can specify which of the layouts to use when printing and/or emailing the payslip on the report options window. This release also adds a wide variety of options from the standard payslip report to the custom payslip options, allowing you tailor the information that will be displayed on the custom payslip at the time of printing.

2	Select report options	23		
Γ	✓ Print Summary Slip			
	M Show Company Name			
	Show Address			
	Show Hourly Rate			
	Show Holiday Pay Entitlement			
	Show Other Leave Entitlement			
	Show Shift Leave Entitlement			
	Show Sick Leave Entitlement			
	Show Alternative Leave Entitlement			
	Show Long Service Leave Entitlement			
	Show Year to Date Totals			
	Show Year to Date KiwiSaver and SuperannuationTotals			
Show Bank Account Number				
	Show Accrued Leave Units			
L	Only print for pays that have been changed			
	Calculate YTD Totals using the pay period end date 💽			
	Wage lines Detail 💌			
	Print payslip layout A4-210 x 297 💌			
	Email payslip layout A4-210×297 💽			
	Exit : Esc			

This release also adds Apprentice Hours to the default custom payslip template.

#### Backing up the Custom Payslip

Custom Payslip report files are now included in company backups. This means that they can be restored when restoring a company or extracted from backup archives if necessary.

When restoring a company backup in EXO Payroll, you have the option of overwriting the Custom Payslip with the version from the backup:

Company Restore
Restore Path
Cverwrite custom payslips
<u>Bestore</u> Cancel

### **Previewing Payslips**

A new **View Payslip** button is available when managing employees' Current and Standard Pays. Clicking this button opens a preview payslip report showing the details of the pay being viewed. A **View Payslip** button is available on the Current Pay window, on the Standard Pay tab of the Employee Maintenance window, and on the Edit Days Paid History window (opened from the Holiday Pay tab of the Employee Maintenance window):

Uveekly Current Pay	Pay Number: 6   Period Ending: 13/08/2	2015   Physical Pay Date: 13/08/201	5		
1 (WALLACE) W	allace, Edward James			a 🗖 🗐	
Wages	Pay Item	Units	Rate	fotal	Employment Details
	Salary			0.00	Standard Pay Salary 0.00
Allowancoc	Wages	40.00 hours	15.0000	600.00	Standard Pay Wages 600.00
	Holiday Pay	0.00 days	0.0000	0.00	Employment Basis Full-Time / Permanent
Hourly Rate	Sick Pay	0.00 hours	0.0000	0.00	Hours Per Pay Period 0.00 Hours Per Standard Day 8.00
	Public Holiday	0.00 hours	0.0000	0.00	Default Cost Centre 14 Akld/Sales
Salary	Alternative Leave	0.00 hours	0.0000	0.00	Phone Number 236-6987 Email
	Bereavement Leave	0.00 hours	0.0000	0.00	Taxation Details
Deductions	Long Service Leave	0.00 days	0.0000	0.00	IRD Number 097-798-796
	Unpaid Leave	0.00 hours			ESCT Rate Calculated Rate: 10.5%
Leave					Leave Calculation Details
	Other Leave	0.00 days		0.00	Holiday Pay History
<u>C</u> osting	Taxable Allowances			0.00	Ordinary Daily Rate Method: Standard Pay
				0.00	Standard Pay 600.00 5.00 10

Employee Maintenance	:			[	- • •
Employee Details	Holiday Pay	Sick & Other Leave	Other	Notes 5	Standard Pay
Employee:	1 Wallace	e, Edward James			¢.
<u> </u>	w	ages	15.0000	600	).00
Allowances	St	alary		(	).00
Hourly <u>R</u> ate	Ta	xable Allowances	(	).00	
Salary	Pr	e-Tax Deductions		(	).00
<u> </u>	Le	ave:		(	).00
Deductions	G	ross Taxable Earnii	ngs	600	.00
		- O torride		94	1.85

ay Number	Туре	Pay Date	Physical Pay Date	Gross Pay	Days Paid	4-Week	52-Week	
	1 N	16/07/2015	16/07/2015	600.00	5.00			
1	2 N	23/07/2015	23/07/2015	1080.00	9.00			
:	3 N	30/07/2015	30/07/2015	600.00	5.00			
4	4 N	06/08/2015	06/08/2015	600.00	5.00			
	5 N	06/08/2015	06/08/2015	600.00	5.00			
			Totals:	3480.00	29.00			
			4-Week Totals:	0.00	0.00			
			52-Week Totals:	0.00	0.00			

### **Distributing Reports**

The Payslip Custom and Certificate of Earnings reports have a new **Destination** option on the Print Report window: Distribution. When this option is selected and the **Distribute** button is clicked, a new Distribution window appears:

L) D	istribut	tion - Payslip	_									23
Sea	arch:											
<b>•</b>	Select	t All							Email All	Print All	MSI AII	
	Select	Code	Name	Alpha Code	Department	Email	Password	Count	Email	Print	MSI	-
•	<	1	Wallace, Edward James	WALLACE	Akid,Sales		No	1				
	$\checkmark$	2	Andrews, Thomas Harley	ANDREWS	Akld,Dispatch		No	1				
	V	3	Houghton, Jannet Faye	HOUGHTON	Akld,Administration		No	1				
	$\checkmark$	4	Smith, Sandra Olive	SMITH	Ham, Administration		No	1				
	V	5	Keating, Karl Adrian	KEATING	Akld,Dispatch		No	1				
	V	6	George, Thomas Russell	GEORGE	Ham, Administration		No	1				
	$\checkmark$	7	Karuso, Robinson Henry	KARUSO	Akld,Dispatch		No	1				
	$\checkmark$	8	Hillary, Matthew Martin	HILLARY	Ham, Administration		No	1				
	$\checkmark$	9	Jackson, William Duncan	JACKSON	Akld,Dispatch		No	1				
	$\checkmark$	20	Tate, Bernard Cedric	TATE	Akld,Administration		No	1				
	$\checkmark$	21	Giles, Harrison Relf	GILES	Ham, Administration		No	1				
	<b>V</b>	22	Watson, Judy May	WATSON	Ham, Sales		No	1				
H												
-												
-												
												$\overline{\nabla}$
			View Summary Dis	tribute All	🔞 Email 🔛	Print 🛛 🥵 MyStaffInfo	Preview		Exit : Esc			

On this window you can select to print reports, send them by email, upload them to MyStaffInfo, or any combination of the three and then distribute all of them in a single operation. You can preview report information before distribution by clicking the **Preview** button, which displays the report for the selected employee. For the custom payslip, a **View Summary** button is also available – clicking this displays the Payslip Summary report.

Options that determine the default distribution settings for employees, i.e. whether reports should be distributed to them by email, print, and/or MyStaffInfo, are now available on the General tab of the Special Options Setup window:



### General Reporting Updates

In addition to the new reports introduced for EXO Health and Safety (see page 12), this release includes cosmetic changes to all reports in the EXO Employer Services system.

#### New Look Reports

The look of all existing EXO Employer Services reports has also been updated with a new font.

#### New Select Report Window

The Select Report window has been resized to show more reports without scrolling:

📕 Select Report						<b>—</b>
Employees Pay	Financial	Ma	intenance	IRD	Report Runs	Custom
Address Labels Alternative Leave Alternative Leave Alternative Leave Bapprentice Hours Bereavement Leave Birthdays Certificate of Earning Clock Card Labels Days Taken Report Employee Hourly R Employee Hourly R Employee Service <b>Employee</b> Holiday Cash-up Co Holidays Cashed-up Hours Analysis Leave Balances Leave Movement R Leave Paid Notes Paid Parental Leave Public Holiday Unpaid Leave	1 year alances gs ates msent Form p eport		Emp All We 1 Or Pr Er Ac	Noyees I eekly Emplo W ccupation: : none: : nail: idress: : nployee d nd employ	Report byees Not showing te lallace, Edward Jam Salesman 236-6987 23 Fleet Street, Rose Ancklap4 1021 letails, including lea yee notes.	Den erminate es edale,
		Select	t 💽 Ex	it : Esc		

### AccountRight Live General Ledger Export

The General Ledger Exporter utility now supports MYOB AccountRight Live. An "MYOB AccountRight Live" option is now available in the **Select Export Type** dropdown. The MYOB AccountRight Live export type supports the same options as the existing MYOB Premier type:

MYOB AccountRight Live Options				
Account Number Length: 6				
Pay Grouping: Each employee pay as a single journal 💌				
Tax Code: N-T				
🔓 Save : F10 💽 Exit : Esc				

### **Toolbar Customisation**

The new toolbar button lets you choose which buttons to show on the toolbar. Clicking this button opens the new Select Items window:

Select Items	23
Item Name	Select
Employee List	
Pay List	
New Employee	
Edit Employee	V
Employee Notes	<b>V</b>
Current Pay	
Print Reports	<b>V</b>
Direct Credit Transfer	
Update Pay	
Backup	V
Maintenance	
PAYG Calculator	
Pay Cycle	
Help	
Diary	<b>V</b>
	-
Save : F10 Reset Default	🛃 E <u>x</u> it : Esc

Tick or clear the boxes for the buttons you want to show or hide and click **Save** to update the toolbar.

### Changes to Backup Options

The Backup Options window has been updated as follows for all EXO Employer Services modules:

- The **Backup Drive** dropdown has been removed; backups are now always made to the hard drive.
- The Hard Disk Backup Directory field has been renamed to Backup Directory.
- An Include Company Documents? option has been added. Ticking this option backs up any company documents added in EXO Health and Safety and EXO Employee Information (see page 9).
- The Number of Backup Sets field now defaults to 20 for new companies.

Backup Options				
Backup Directory:				
C:\PAYROL~2\Backup\				
Number of Backup Sets: 20				
Prompt user to Backup on Exit?				
Include Company Documents?				
Include Employee Documents?				
🗇 constal 🖂 trà tra l				

The existing **Include Employee Documents?** option now applies to documents added to employee records in EXO Health and Safety as well as in EXO Employee Information.

#### **Backup File Names**

The files that are created by the backup process are now named using the format: <company database folder name>\_<action>\_<paynum details if any>\_<datetime> For example, DATABASE\_UpdateCurrPay\_Num5\_20150821\_1557.Z0

### Installing MyStaffInfo

MYOB MyStaffInfo is now included in the main MYOB EXO Employer Services installer:

🖅 Select Components		<b>—</b>			
	In the options list below, select the checkboxes for the options that you would like to have installed. The disk space fields reflect the requirements of the options you have selected.				
MYOB ENTERPRISE SOLUTIONS	MYOB EXO Payroll	34444 k			
	MYOB EXO Time and Attendance	18082 k			
	MYOB EXO Health and Safety	17074 k			
	MYOB EXO Employee Information	29721 k			
	MYOB EXO Remote	8533 k			
	MYOB EXO Clarity	17208 k			
	MYOB EXO MyStaffInfo	2304 k			
МУОВ	Disk Space Required: Disk Space Remaining:	127366 k 87888327 k			
	< <u>B</u> ack <u>N</u> ext >	Cancel			

This allows you to install updates to the MyStaffInfo Management Console without the need for a separate installer executable.

## **Resolved Issues**

The following issues have been addressed in this release:

Problem Record	Service Request	Description
114733429782	110632967105 17777193916 17100832016 16893279346 16226138394	If an incorrect date range was specified for the IR345 report, the report would fail with the error message "Error 107 - Operator/operand type mismatch". This has been resolved.
11952134055	11969689917 11950596951 11947543738	Printing reports with the Pay Type set to Standard sometimes displayed incorrect PAYE amounts. This has been addressed by the addition of a new Recalculate Standard Pays utility (located in the Utilities menu). Running this utility recalculates all Standard Pays to ensure that PAYE amounts will be correct.
111197192433	114962795281 113356249891 110829793571	The General Ledger Exporter utility did not support MYOB AccountRight Live. This has been resolved— see page 3.
110645931073 110248691731	112963622691 19336686911	In EXO Employee Information, changing to a different employee record when adding a Performance Review Plan caused the plan to be assigned to other employees as well. This has been resolved.
111568677396	111233362901	When reversing wages, if the amount was greater than -\$9999.99, incorrect rounding would be applied. This has been resolved.
113251211887	112801146850	The Physical Pay Date or Pay Period End Date sometimes appeared in employees' Standard Pays. This has been resolved.
14562929627	14218828118	If the user went through the Termination Wizard, but selected No when asked "Terminate employee automatically after update?" the employee would not be terminated, but the TERMINATED label would still appear in the Employee Maintenance window. This has been resolved.
119624693913	119492075731	An "expression is invalid" error appeared after opening the Leave Planner in EXO Payroll and then opening the Staff Scheduler in EXO Time and Attendance. This has been resolved.

### Resolved Issues

120737080973	120734497681	When using the Custom Payslip, payroll giving tax credits would appear on the wrong payslips (PAYE was calculated correctly, but displayed incorrectly). This has been resolved.
12742595466	12741366319	The text on the Public Holiday section of the Leave Management window had the potential to mislead users. This has been resolved; the instructions on this screen have been updated to make it clearer what the user needs to do.
-	-	This release adds a <b>Show Accrued Leave Units</b> option to the Custom Payslip report, which lets you hide the Accrued Leave column on the Custom Payslip.
-	-	The Custom Payslip did not display the balance of Reducing Balance deductions. This has been resolved.
-	-	This release includes optimisations to the upgrade process, which should result in faster upgrades and prevent upgrades from hanging, especially on sites with large numbers of users and sites where MyStaffInfo is also installed.
-	-	When previewing the Employee Induction report in EXO Employee Information or EXO Health and Safety, all induction information appeared, instead of just the induction information for the selected employee. This has been resolved.

# **Known Issues**

The following Known Issues have been identified in this release.

#### Error 2066 in a networked environment

The FoxPro error: "2066/Index file [filename].CDX is corrupt. Please rebuild it" can occur persistently on network systems that have a Server 2008 operating system with workstations running Windows Vista, Windows 7 or 2008 Terminal Server; or peer-to-peer networks where the server/workstation is running a Windows Vista or Windows 7 operating system, and one or more other workstations are also using a Windows Vista or Windows Vista or Windows 7 operating system.

For information on this issue and suggested workarounds, see the following articles on the MYOB Enterprise Knowledgebase:

- <u>What to do when getting an Error 2066 message</u>
- Consistent error 2066 in a networked environment