

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	18
General Reporting Updates.....	19
New Look Reports.....	19
New Select Report Window.....	19
AccountRight Live General Ledger Export.....	20

Toolbar Customisation	20
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 anzpayrollsupport@myob.com.

Installation

Pre-Install Requirements

Requirements for PCs running MYOB EXO Employer Services components are detailed in the Minimum System Requirements document, available on the [MYOB website](#).

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.

New Features

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.

The screenshot shows the 'Safety Equipment Item Maintenance' window with the 'Details' tab selected. The window has three tabs: 'Details', 'Employee Assignment', and 'Notes'. The 'Details' tab contains the following fields and controls:

- Equipment Code: 2
- Name: Protective Eyewear
- Equipment Information section:
 - Task: Welding & Machining
 - Review Frequency: 3 Months
 - Replacement Frequency: 0
 - Reminder Prior: 1 Weeks
 - Reminder Prior: 2 Weeks
- Equipment Description: Clear plastic glasses that wrap around the head
- Maintenance Advice: Check for severe scratching. Replace where needed
- Picture section: Insert picture file here, with 'Insert File' and 'Clear' buttons.

At the bottom of the window is a navigation bar with the following buttons: Prev : F7, Next : F8, Find : F9, Add : F4, Delete : F6, and Exit : Esc.

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

The screenshot shows a window titled "Safety Equipment" with two tabs: "Safety Equipment" and "Notes". The "Safety Equipment" tab is active and contains the following fields:

- Equipment Information:**
 - Staff Code: 5 (text input), Keating, Karl Adrian (text input)
 - Equipment Code: 2 (text input), Protective Eyewear (text input)
 - Equipment Description: Clear plastic glasses that wrap around the head (text input)
 - Maintenance Advice: Check for severe scratching. Replace where needed (text input)
- Equipment Issue Date:** 27/08/2015 (dropdown)
- Review Frequency:** 3 (spin box), Months (dropdown)
- Replacement Frequency:** 0 (spin box), (dropdown)

The "Review" section contains:

- Review Due:** 27/11/2015 (dropdown)
- Reminder Prior:** 1 (spin box), Weeks (dropdown)
- Reminder Date:** 20/11/2015 (text input)
- Review** button

The "Replacement" section contains:

- Replacement Due:** // (dropdown)
- Reminder Prior:** 2 (spin box), Weeks (dropdown)
- Reminder Date:** // (text input)
- Replace** button

At the bottom, there are two buttons: "Save : F10" and "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.

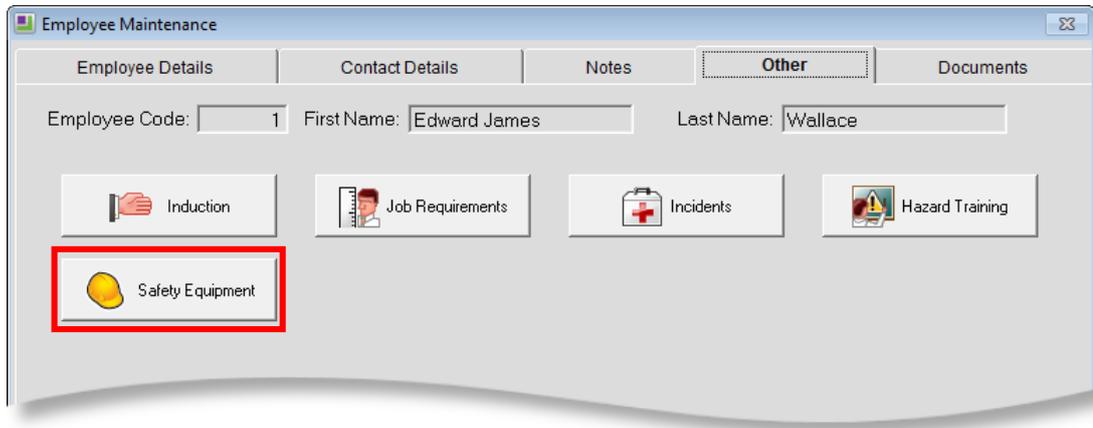
Review and replacement dates can be rolled over for the item—the Employee Assignment tab also has **Review** and **Replace** buttons that let you roll over the dates for the selected employee.

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

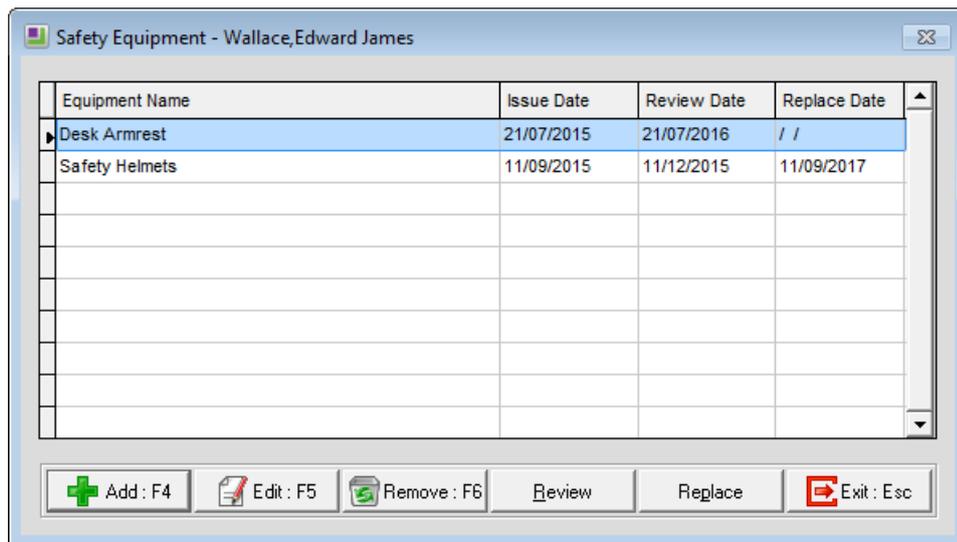
Notes are automatically generated when an item is reviewed or replaced. These notes can be viewed and edited on the Notes tab of the Safety Equipment window.

Employee Maintenance

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



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

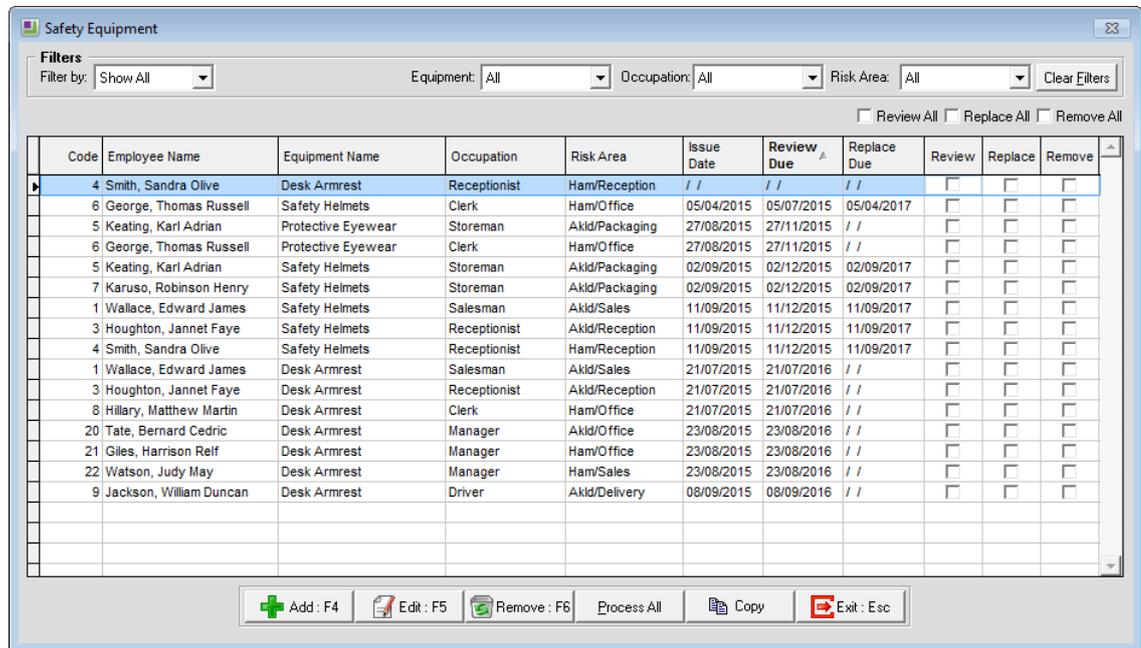


The **Add** and **Edit** buttons let you assign new items of equipment to the employee and edit their details using the new Safety Equipment window (see page 5).

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:



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:

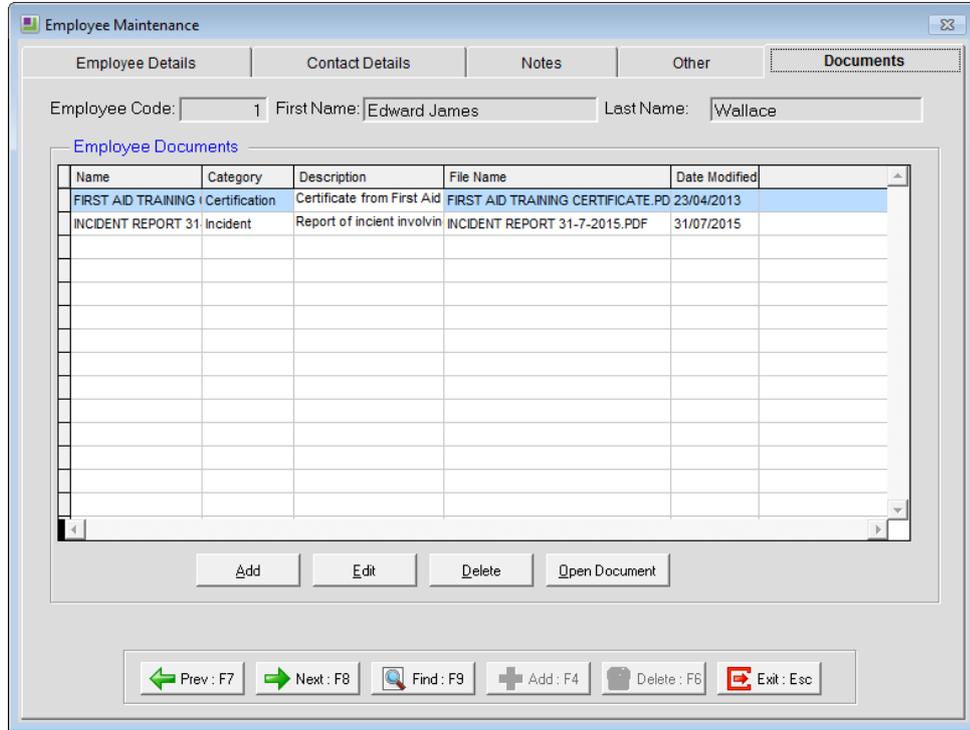
- Click **Add** to add new item/employee assignments. You will be asked to select a safety equipment item, then select employees to assign it to using the new Select Employee window (see page 4).
- Click **Edit** to edit the details of individual items using the new Safety Equipment window (see page 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

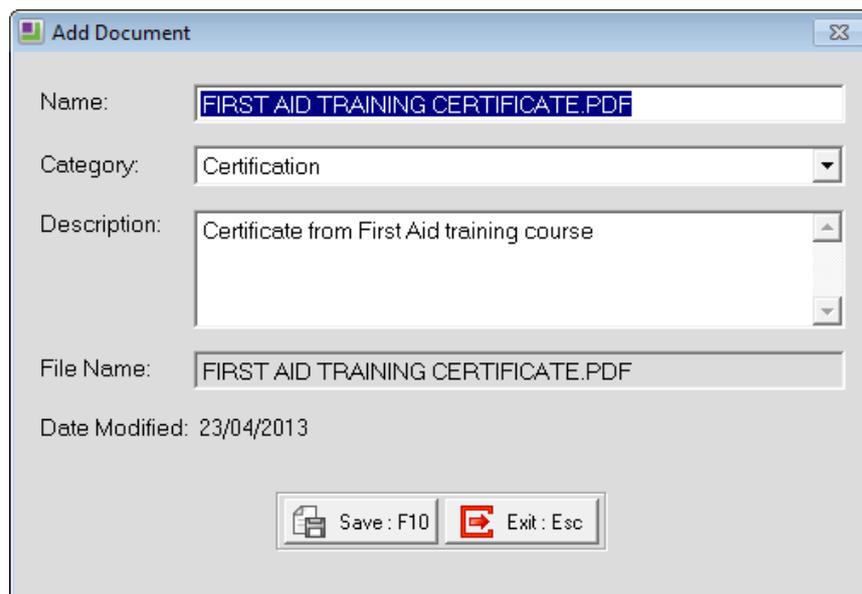
Employee Documents

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



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:



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).

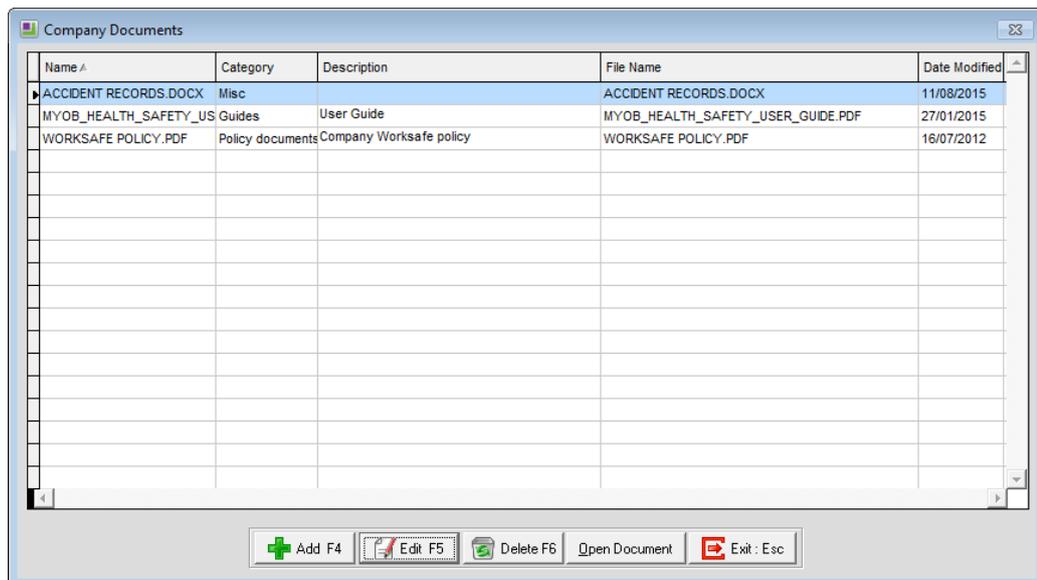
Double-click on an existing document, or select the document and click **Open Document**, to open it in the default editor for the type of file.

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:



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:

The screenshot shows the 'Employee Maintenance' window with the 'Contact Details' tab selected. The window contains several sections for contact information:

- Employee Details:** Employee Code: 1, First Name: Edward James, Last Name: Wallace
- Residential Contact Details:** Address, Suburb, City, Phone: 236-6987
- Postal Contact Details:** Address: 23 Fleet Street, Suburb: Rosedale, City: Auckland
- Emergency Contact:** Name: Anne Marie Wallace, Address: 23 Fleet Street, Suburb: Rosedale, City: Auckland, Phone: 236-6987
- Health and Safety Coordinator:** Name: Bernard Tate, Position: Manager, Phone: 09 236 6987
- Supervisor Details (highlighted in red):** Supervisor: Judy May Watson, Email: judy@demonstration.co.nz, Phone: 09 306 4005

At the bottom of the window, there is a navigation bar with buttons for: Prev : F7, Next : F8, Find : F9, Add : F4, Delete : F6, and Exit : Esc.

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.

The screenshot shows the 'Incident Register' window with the 'Incident' tab selected. The 'Details' section contains the following fields:

- Incident Code: 5
- Employee: 7
- Employee Name: Robinson Henry Karuso
- Type: Serious Harm
- Date: 17/04/2015
- Time: 9:45 AM
- Shift: Day
- Incident Number (Worksafe): [Empty field]
- What were you doing immediately before the incident?: Binding boxes with the wrapping machine. (Nylon strapping)
- Describe what happened: Received a mild electric shock from the metal surface of the machine.
- Cause:
 - Incident Mechanism: Heat radiation or energy
 - Contact with electricity
 - Agency of Incident: Machinery and (mainly) fixed plant
 - Filling, bottling and packaging equipment

At the bottom of the window, the following information is displayed:

- Link to online form: <http://www.dol.govt.nz/Tools/Accident/Home/SeriousHarmNotification>
- WORKSAFE New Zealand: 0800 030 040

Navigation buttons at the bottom include: Prev : F7, Next : F8, Find : F9, Save : F10, Cancel, and 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		WORKSAFE NEW ZEALAND 2015	
Email: seriousham.notification@worksafe.govt.nz Fax: 09 984 4115 Phone: 0800 030 040 Post: The Registrar, WorkSafe NZ, P.O. Box 105-146, Auckland 1143			
NAME OF ORGANISATION <u>Demonstration Company</u>		BRANCH/DEPARTMENT <u>Ham/Office</u>	
PARTICULARS OF ACCIDENT			
Date of accident <u>06/04/2015</u>	Time <u>3:30 PM</u>	Location <u>Outside entrance to Central Park in Penrose, going North though the lights.</u>	Date reported <u>12/08/2015</u>
<u>(M) T W T F S S</u>			
THE INJURED PERSON			
Name <u>Andrews, Thomas Harley</u>		Address <u>65a George Street Parnell Auckland 1023</u>	
Age <u>23.6</u>	Phone number <u>303-6987</u>	Length of employment - at plant <u>on job 27 months</u>	
Date of accident <u>06/04/2015</u>		Injured part of body	

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

WORKSAFE
NEW ZEALAND

Notice or record of accident/serious harm
 Email: seriousharm.notification@worksafe.govt.nz Fax: 09 984 4115
 Phone: 0800 030 040 Post: The Registrar, WorkSafe NZ, P O Box 105-146, Auckland 1143

<p>1 Particulars of employer: (Business name and address) Demonstration Company PO Box 1234 Auckland</p> <p>2 Location of place of work: PO Box 1234 Auckland Shop, shed, unit no, floor, building; Street no and name; Locality / suburb</p> <p>3 Personal data of injured person: Name</p>	<p>9 Agency of accident / serious harm:</p> <p><input type="checkbox"/> Machinery or (mainly) fixed plant <input type="checkbox"/> Mobile plant or transport <input type="checkbox"/> Powered equipment, tools or appliances <input type="checkbox"/> Non-powered handtools, appliances and equipment <input type="checkbox"/> Chemical or chemical products <input type="checkbox"/> Material or substance <input checked="" type="checkbox"/> Environmental agency <input type="checkbox"/> Animal, human or biological agency (not bacteria or virus) <input type="checkbox"/> Bacterial or virus</p> <p>10 Body part:</p> <p><input type="checkbox"/> Head <input type="checkbox"/> Neck <input type="checkbox"/> Trunk <input type="checkbox"/> Lower limbs <input type="checkbox"/> Multiple locations</p>
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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.

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Page: 1

Demonstration Company

Employee Induction Completed

1 Wallace, Edward James
First Aid Introduction
 The following steps are required to be followed before employee is on duty:

- Occupational Overuse
Employee knows what is the occupational overuse in his/her position and the ways to prevent it.
- Video - First Aid
Training video on dealing with minor injuries and using items in first aid pack.
- Where to Get Help
Employee knows where to get help in certain situations.

Signed (Employee): _____ Dated: _____

Signed (Supervisor): _____ Dated: _____

— End of Report —

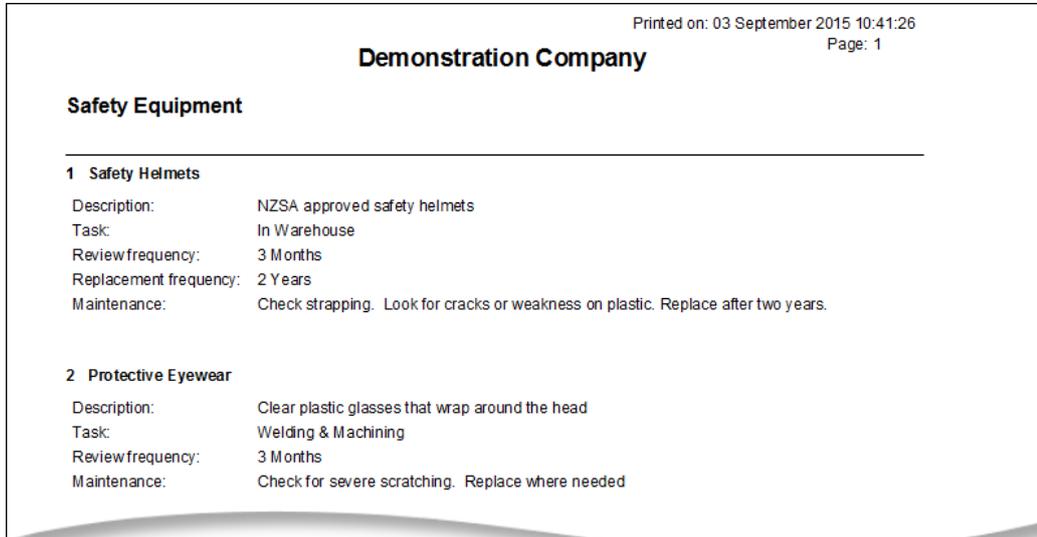
Note: These reports are also available in EXO Employee Information.

Hazard Training Sheet Report

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

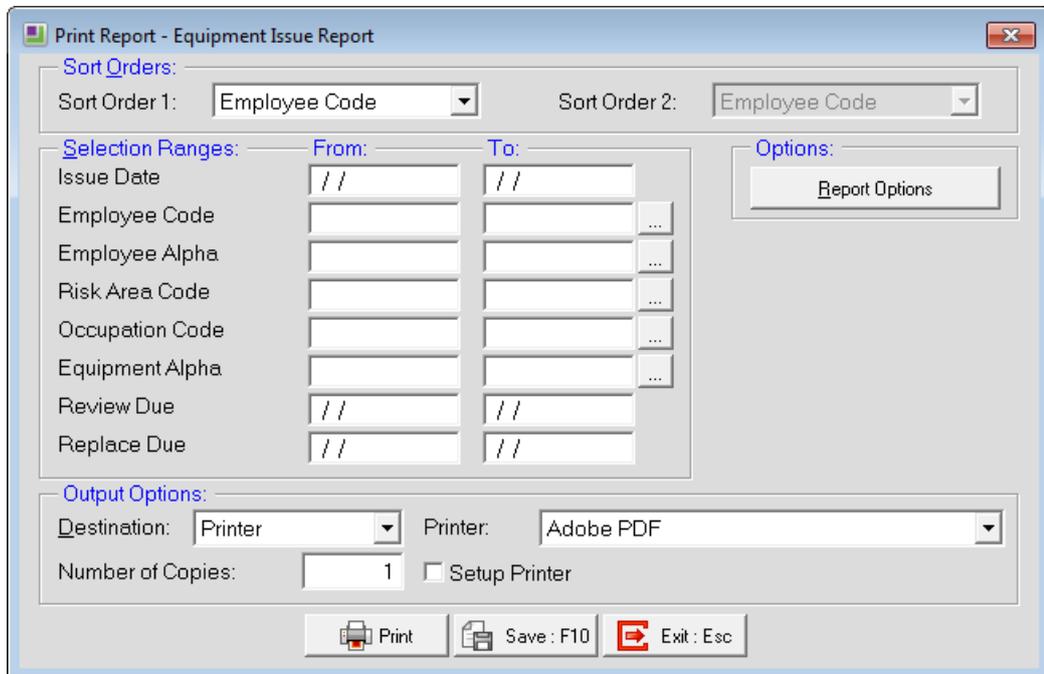
Safety Equipment Report

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:



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:

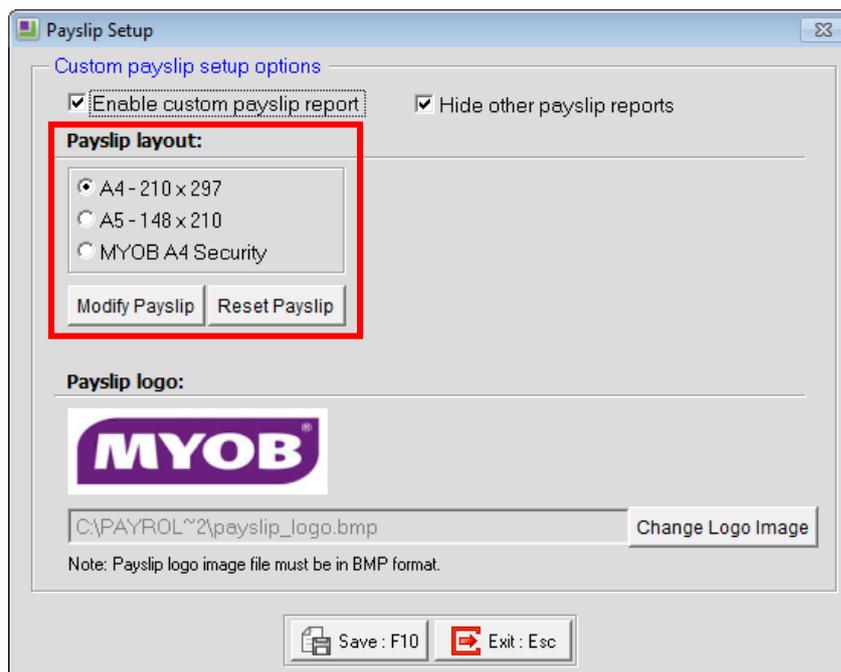


Updates to the Custom Payslip

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

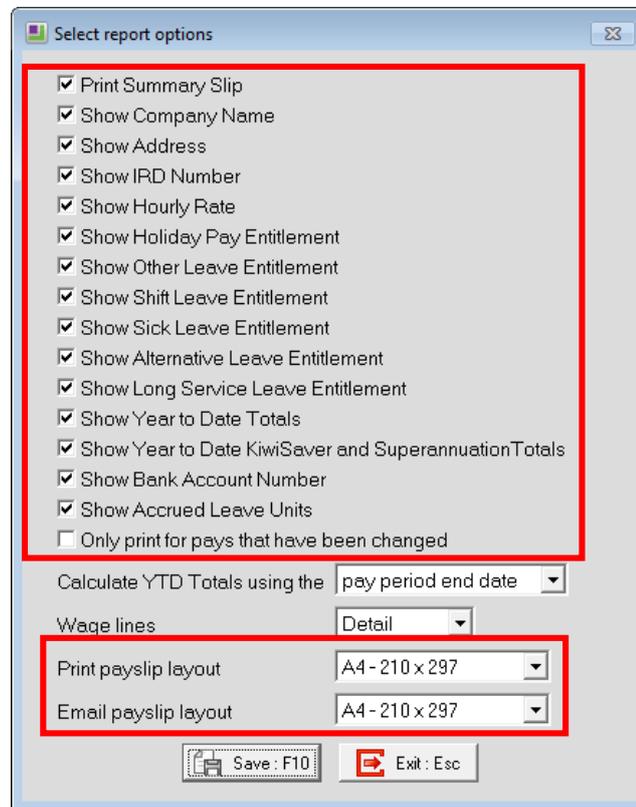
- A4 (210mm x 297mm)
- A5 (148mm x 210mm)
- MYOB A4 Security

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:



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.

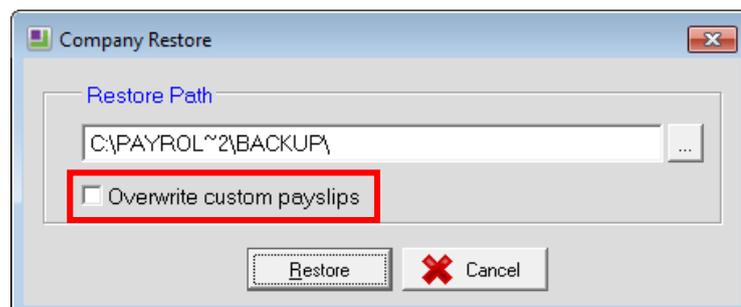


This release also adds Apprentice Hours to the default custom payslip template.

Backing up the Custom Payslip

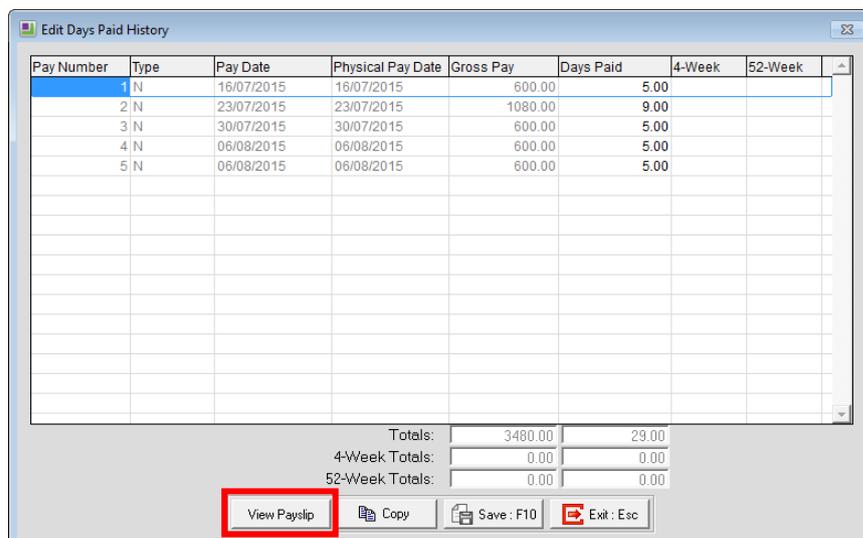
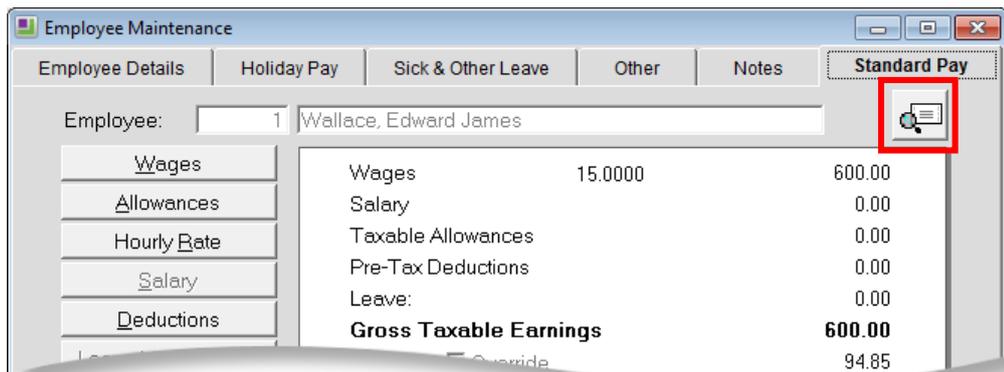
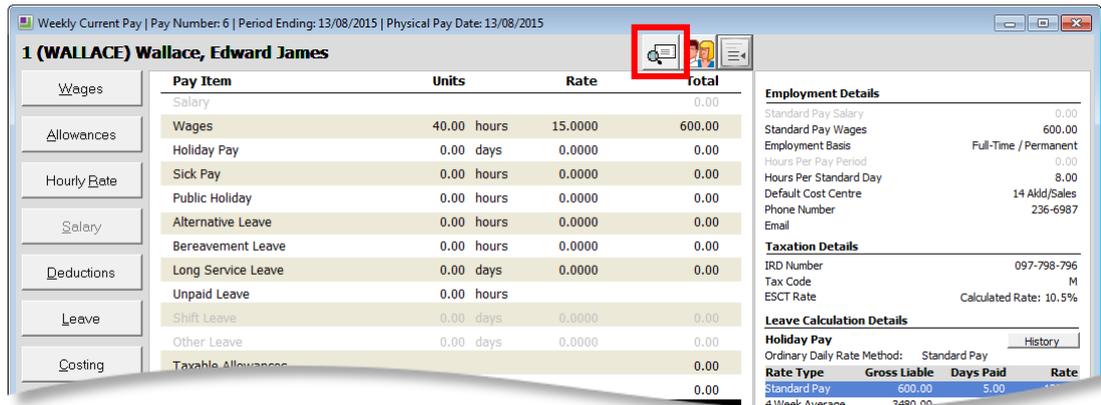
Custom Payslip report files are now included in company backups. This means that they can be restored when restoring a company or extracted from backup archives if necessary.

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



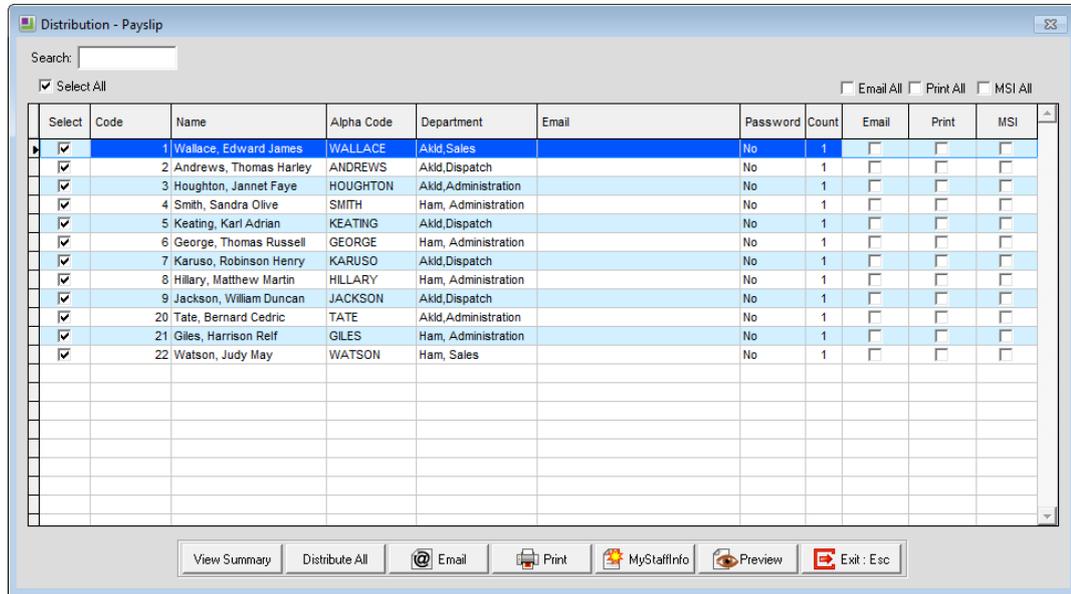
Previewing Payslips

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):



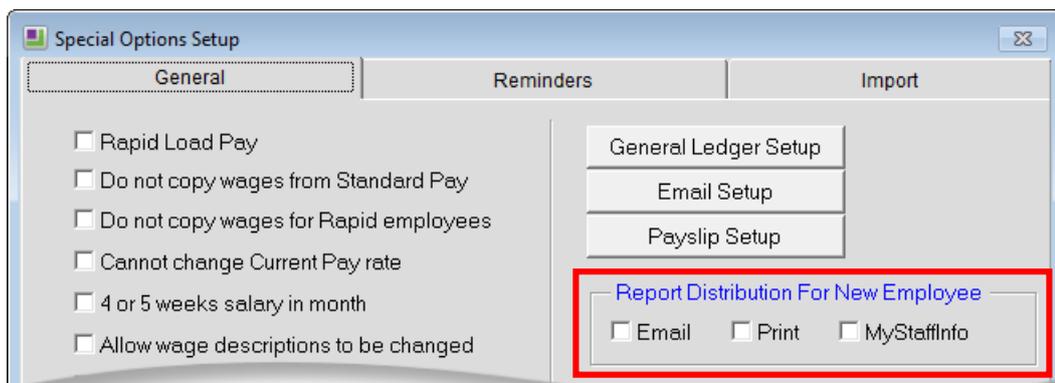
Distributing Reports

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:



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

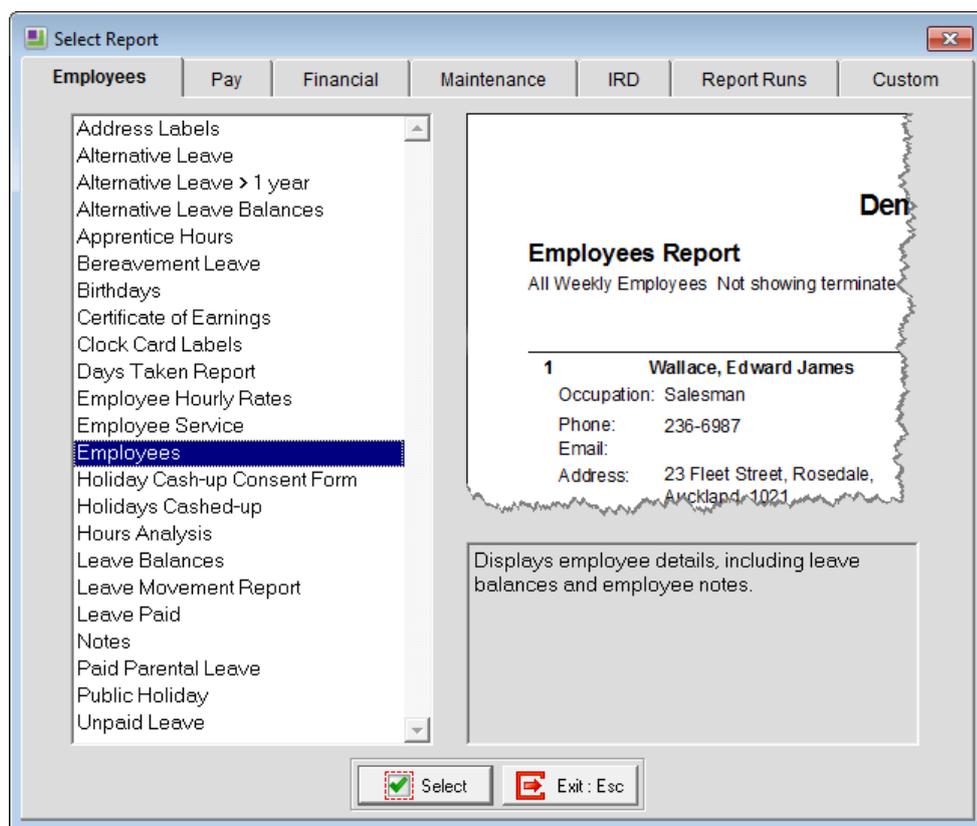
In addition to the new reports introduced for EXO Health and Safety (see page 12), this release includes cosmetic changes to all reports in the EXO Employer Services system.

New Look Reports

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

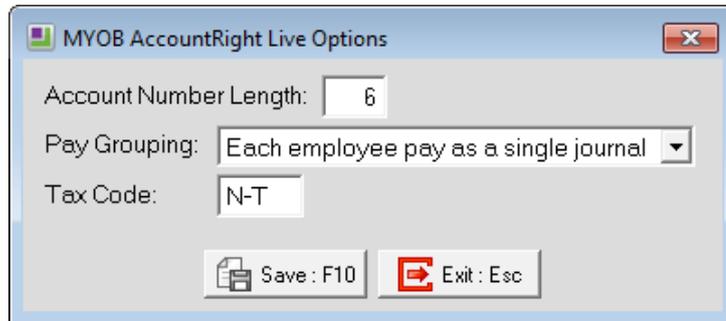
New Select Report Window

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



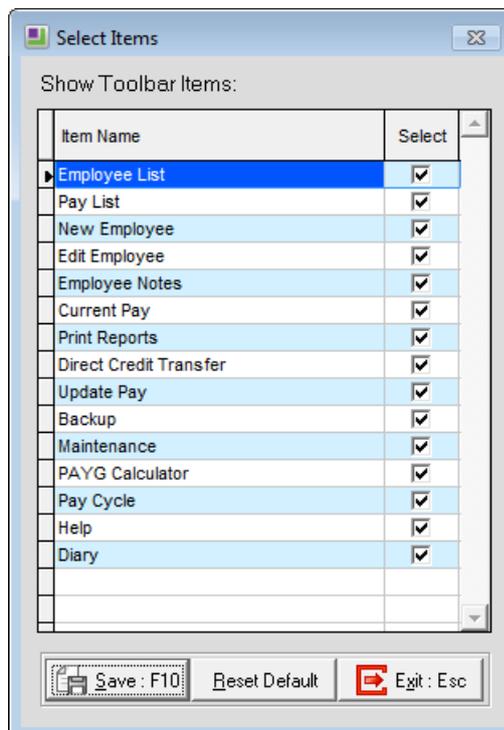
AccountRight Live General Ledger Export

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:



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:

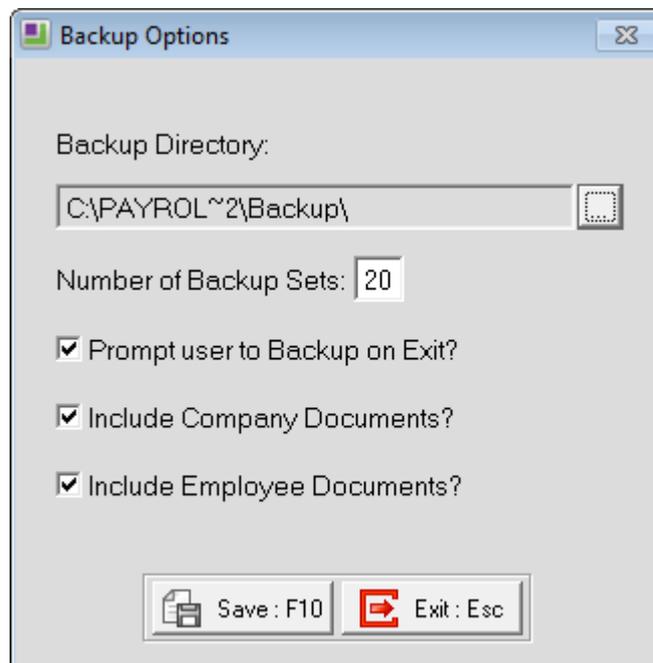


Tick or clear the boxes for the buttons you want to show or hide and click **Save** to update the toolbar.

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.



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.

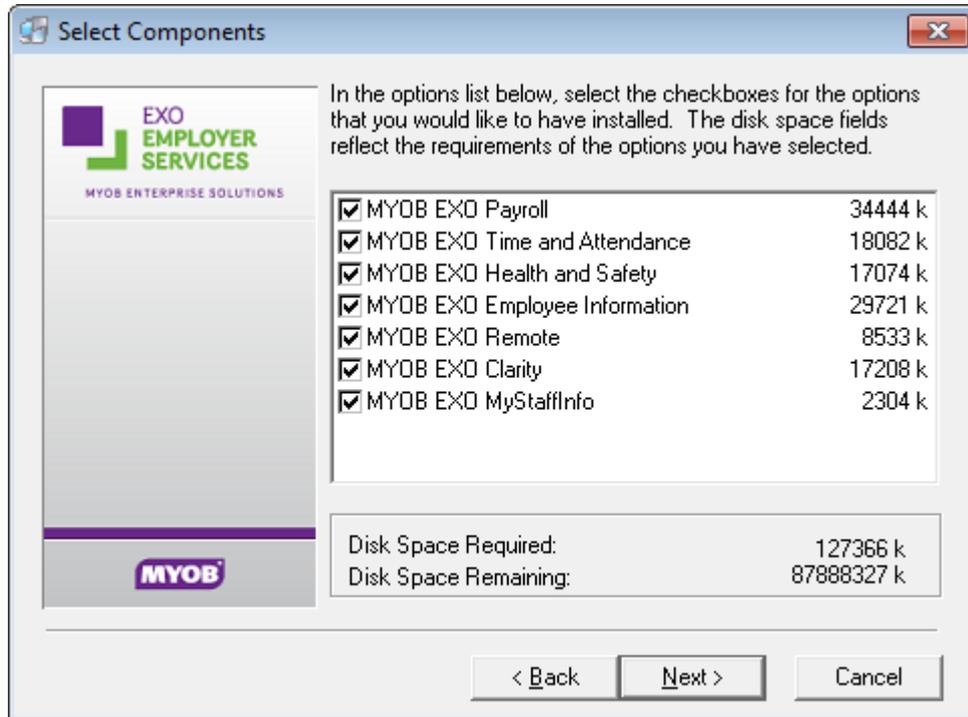
Backup File Names

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:



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 Show Accrued Leave Units 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 7 operating system.

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

- [What to do when getting an Error 2066 message](#)
- [Consistent error 2066 in a networked environment](#)