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# MYOB IMS Payroll version 6.92

Release Notes

November 2024

myob

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# Introduction

The 6.92 release improves lots of existing features and reports to streamline your workflow.

## Installing your upgrade

**Note:** Before installing the desktop upgrade, you must close all **Open** payroll periods in your payroll companies

### To install the desktop upgrade

Before you install the desktop version:

1. Close all **Open** payroll periods in your payroll companies.
2. Back up each of your payroll companies via the **Tools** menu.
3. Close all IMS applications on your PC.

**Note:** Uninstalling an earlier version of IMS Payroll prior to installing this version is not recommended or required, as you'll need to reinstall any custom payroll software or modules.

If you're downloading the installer:

1. Double-click the executable file (.exe) that you downloaded.
2. Install the new version on every computer that has MYOB IMS Payroll installed.

### To install the IMS Payroll Cloud upgrade

1. Log in to IMS Payroll Cloud.
2. At the bottom left, click the gold **Upgrade** button.

**Note:** The **Upgrade** button only appears after you click on a company with the **Closed** status.

3. Repeat steps 1–2 for each payroll company you manage.

# New Features

## Simpler setup for sending emails

We've added a simpler way to email from MYOB IMS Payroll, so you no longer need to set up anything related to SMTP.

Go to **Tools > Setup SMTP** to open the **E-mail – SMTP Mail Profile** screen. There, you can choose the new **Use MYOB Email Service** option from the **Authenticate** dropdown.

E-mail - SMTP Mail Profile v1.27

SMTP Host	<input type="text"/>	<input checked="" type="checkbox"/> Send
Port	<input type="text" value="25"/> Requires Secure Connection? (SSL/TLS) <input type="checkbox"/>	<input checked="" type="checkbox"/> Close
User Name	<input type="text"/>	<input checked="" type="checkbox"/> Test Settings
Authenticate	<b>Use MYOB Email Service</b> <input type="text"/> Retain Password? <input type="checkbox"/>	<input checked="" type="checkbox"/> Help
Password	<input type="text"/>	<input checked="" type="checkbox"/> Recipient Report
Senders E-Mail	<input type="text" value="example@email.com"/>	<input checked="" type="checkbox"/> Show Log
CC E-Mail	<input type="text"/>	
Show Report	<input checked="" type="checkbox"/> Email Hosted via Office 365? <input checked="" type="checkbox"/>	

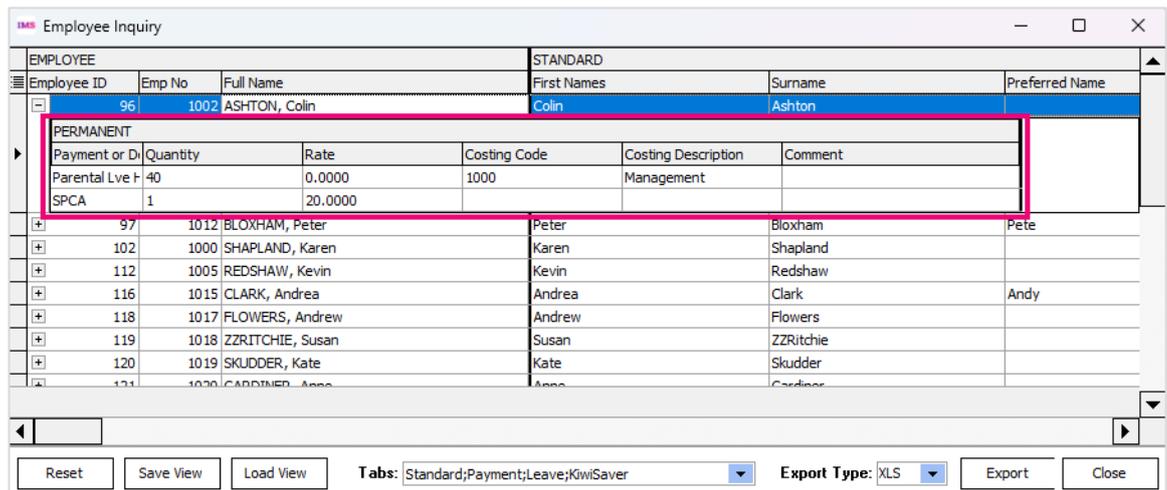
When using the MYOB email service, the only other information you need to enter is the **Senders E-Mail**.

## Employee Inquiry improvements

We've made two main improvements to the **Employee Inquiry** screen, which you can open by clicking the **Find** icon  on the **Employee** screen.

### Showing permanent transactions

You can now view an employee's permanent transactions by clicking the new plus icon  next to their name.



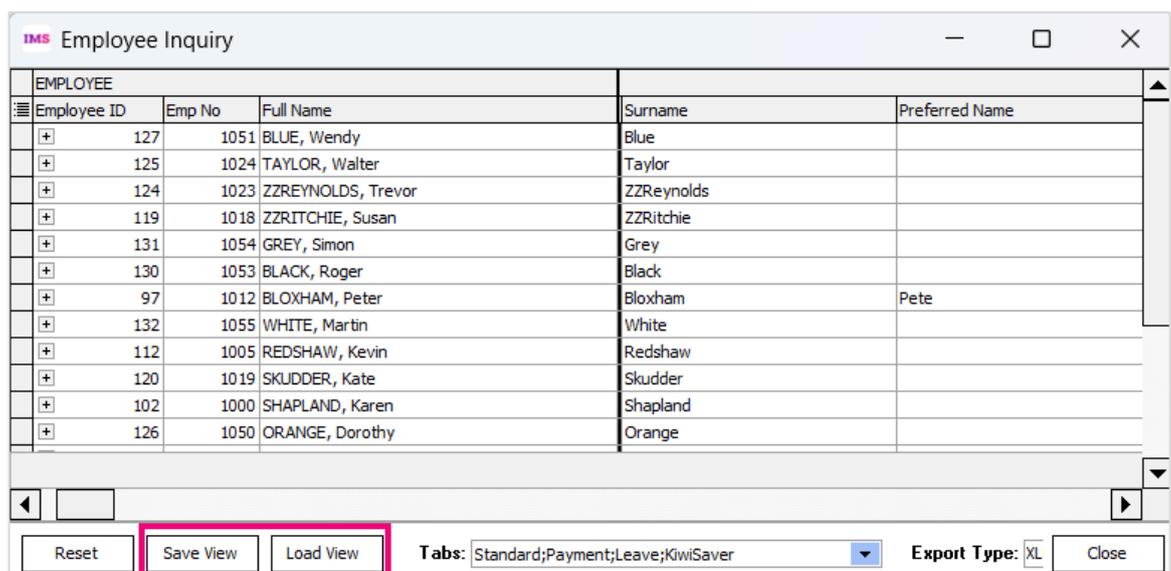
The screenshot shows the 'Employee Inquiry' window with a list of employees. Employee 96, COLIN ASHTON, is selected. A detailed view of his permanent transactions is shown below his name. The transactions table is highlighted with a pink border.

Payment or D	Quantity	Rate	Costing Code	Costing Description	Comment
Parental Lve	40	0.0000	1000	Management	
SPCA	1	20.0000			

**Note:** You cannot export permanent transactions from the **Employee Inquiry** screen.

### Saving filters

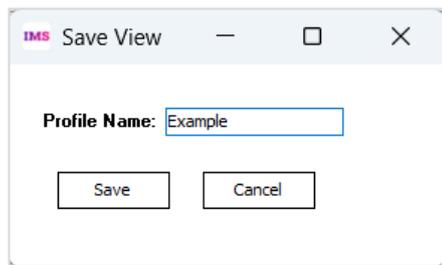
You can now save your filters as a view. Loading a saved view instantly changes your filters, so you don't have to manually tweak your filters every time you want to view different information.



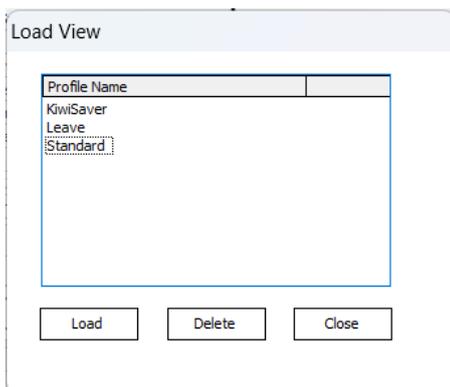
The screenshot shows the 'Employee Inquiry' window with a list of employees. The 'Save View' button is highlighted with a pink border.

EMPLOYEE	Employee ID	Emp No	Full Name	Surname	Preferred Name
	+	127	1051 BLUE, Wendy	Blue	
	+	125	1024 TAYLOR, Walter	Taylor	
	+	124	1023 ZZREYNOLDS, Trevor	ZZReynolds	
	+	119	1018 ZZRITCHIE, Susan	ZZRitchie	
	+	131	1054 GREY, Simon	Grey	
	+	130	1053 BLACK, Roger	Black	
	+	97	1012 BLOXHAM, Peter	Bloxham	Pete
	+	132	1055 WHITE, Martin	White	
	+	112	1005 REDSHAW, Kevin	Redshaw	
	+	120	1019 SKUDDER, Kate	Skudder	
	+	102	1000 SHAPLAND, Karen	Shapland	
	+	126	1050 ORANGE, Dorothy	Orange	

To save a view, set up your filters like normal. Then, click **Save View**. In the **Save View** window, enter a **Profile Name** and click **Save**.



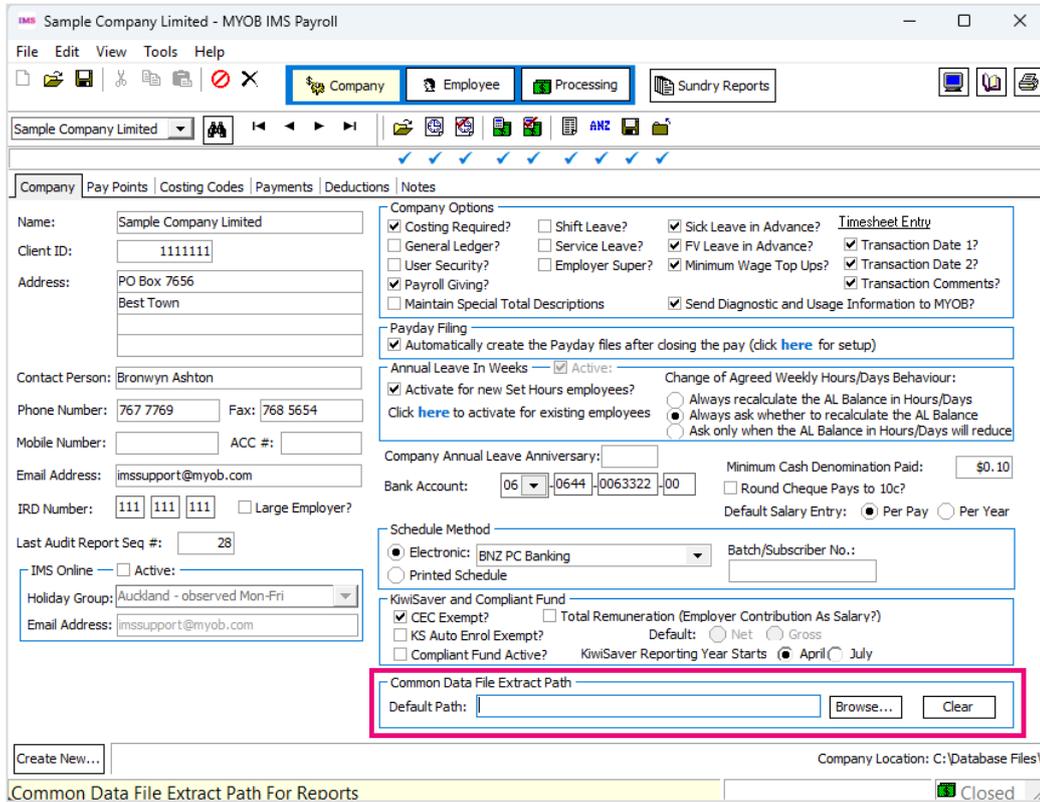
To load a view that you've saved, click **Load View**. On the **Load View** screen, select the view you want and click **Load**. You can also delete views on this screen.



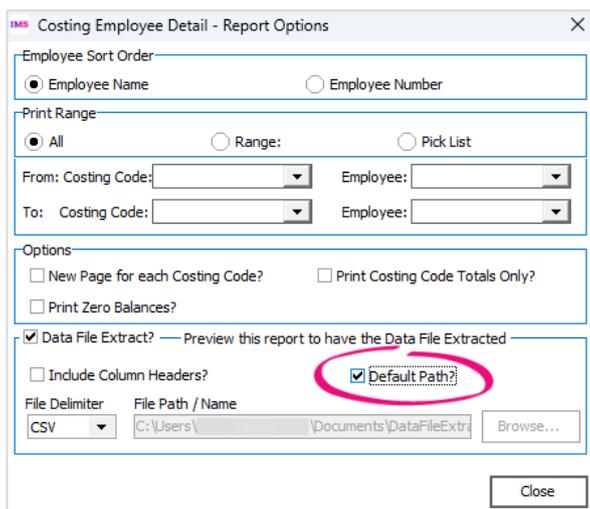
# Default location for extracted reports

You can now set a default file path for saving data file extracts of reports.

On the **Company** tab of the **Company** screen, we've added a new **Common Data File Extract Path** section. Click **Browse** to choose a default path where your data file extracts will be saved.



After choosing a default path, you need to individually choose which reports are saved to that path. Go to the **6-Reports** tab of the **Processing** screen and click **Options** for one of the reports. Then, select the **Default Path?** checkbox.

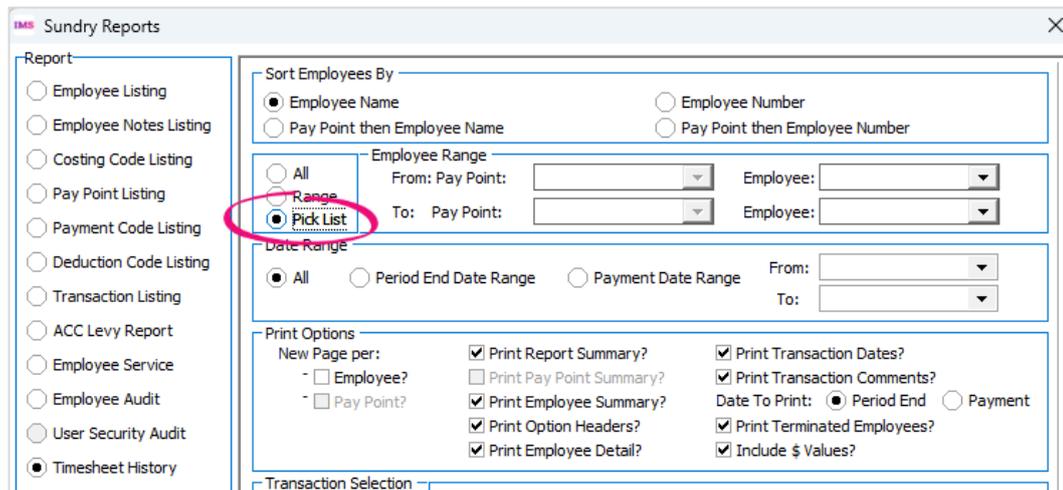


You can also use the default path with sundry reports that have the data file extract option.

## Picking employees to include in sundry reports

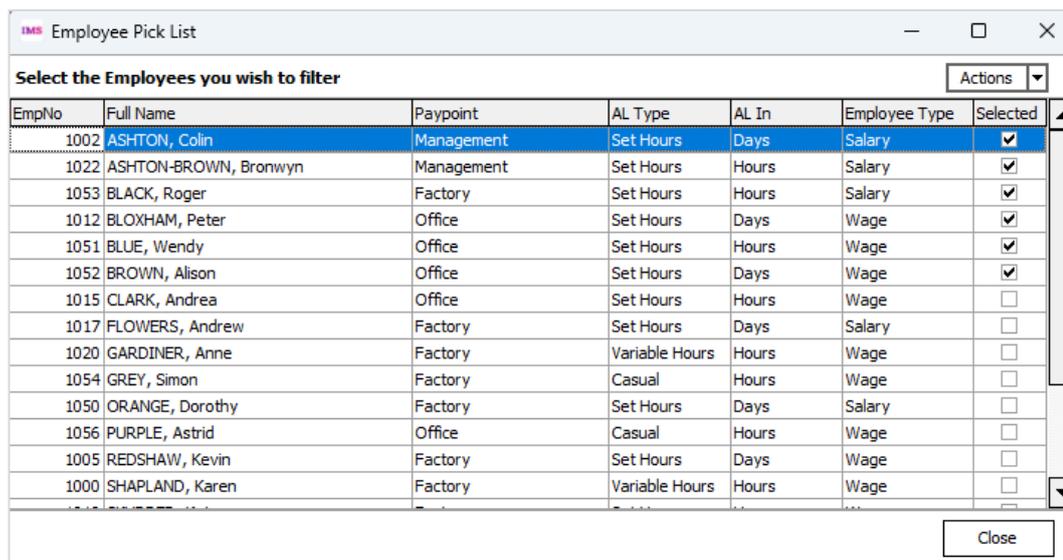
For the **Timesheet History**, **Leave History** and **Standard Hours Worked** sundry reports, you can now choose to only include specific employees.

In the report settings, select the **Pick List** option.



The screenshot shows the 'IMS Sundry Reports' window. On the left, a list of report types is shown, with 'Timesheet History' selected. The main area is divided into several sections: 'Sort Employees By' (with 'Employee Name' selected), 'Employee Range' (with 'Pick List' selected and circled in red), 'Date Range' (with 'All' selected), and 'Print Options' (with several checkboxes checked, including 'Print Report Summary?', 'Print Transaction Dates?', 'Print Transaction Comments?', 'Print Employee Summary?', 'Print Option Headers?', 'Print Employee Detail?', 'Print Terminated Employees?', and 'Include \$ Values?').

The **Employee Pick List** window opens. Select the employees you want to include and click **Close**.



The screenshot shows the 'IMS Employee Pick List' window. It has a title bar and a 'Close' button. The main area is a table with the following columns: EmpNo, Full Name, Paypoint, AL Type, AL In, Employee Type, and Selected. The table contains 17 rows of employee data. The 'Selected' column has checkboxes for each employee, with the first five rows checked.

EmpNo	Full Name	Paypoint	AL Type	AL In	Employee Type	Selected
1002	ASHTON, Colin	Management	Set Hours	Days	Salary	<input checked="" type="checkbox"/>
1022	ASHTON-BROWN, Bronwyn	Management	Set Hours	Hours	Salary	<input checked="" type="checkbox"/>
1053	BLACK, Roger	Factory	Set Hours	Hours	Salary	<input checked="" type="checkbox"/>
1012	BLOXHAM, Peter	Office	Set Hours	Days	Wage	<input checked="" type="checkbox"/>
1051	BLUE, Wendy	Office	Set Hours	Hours	Wage	<input checked="" type="checkbox"/>
1052	BROWN, Alison	Office	Set Hours	Days	Wage	<input checked="" type="checkbox"/>
1015	CLARK, Andrea	Office	Set Hours	Hours	Wage	<input type="checkbox"/>
1017	FLOWERS, Andrew	Factory	Set Hours	Days	Salary	<input type="checkbox"/>
1020	GARDINER, Anne	Factory	Variable Hours	Hours	Wage	<input type="checkbox"/>
1054	GREY, Simon	Factory	Casual	Hours	Wage	<input type="checkbox"/>
1050	ORANGE, Dorothy	Factory	Set Hours	Days	Salary	<input type="checkbox"/>
1056	PURPLE, Astrid	Office	Casual	Hours	Wage	<input type="checkbox"/>
1005	REDSHAW, Kevin	Factory	Set Hours	Days	Wage	<input type="checkbox"/>
1000	SHAPLAND, Karen	Factory	Variable Hours	Hours	Wage	<input type="checkbox"/>

## Easier to identify overridden timesheets

If you override timesheet values, the overridden values are now shown in *italic* text after the pay has been closed – similar to how the rates are currently displayed in **Timesheet Entry**. You can see this in two places:

- The **History > Timesheet History** tab of the **Employee** screen.
- The **Sundry Report > Timesheet History** report.

## Total hours on payslips

On employee payslips, you can now include the total hours that they worked in that pay period.

On the **6-Reports** tab of the **Processing** screen, select the **Payslip** report and click **Options**. Then, on the **Payslip – Report Options** window, select the **Total Hours?** checkbox.

The screenshot shows the 'Payslip - Report Options' window with the following settings:

- Sort Order:**  Employee Name,  Employee Number,  Pay Point then Employee Name,  Pay Point then Employee Number
- Print Range:**  All,  Range,  Pick List. From: Pay Point: [dropdown], Employee: [dropdown]. To: Pay Point: [dropdown], Employee: [dropdown].
- Show Figures for:**
  - Annual Leave Outstanding?  Sick Leave Outstanding?
  - AL In Weeks Outstanding?  DV Leave Balance?
  - Annual Leave Accrued?  Alternative Holidays?
  - AL In Weeks Accrued?  Time in Lieu?  KiwiSaver Employer Contribution?
  - Annual Leave Balance?  Apprentice Hours?
  - AL In Weeks Balance?  Outstanding Deduction Balances?
  - AL Cash Up Balance?
- Payslip Type:**  Standard,  A4,  IMS Laser,  A4 IMS Laser,  Impact
- Printing Options:**
  - Address?  Only if Net Different?  Tax Code?  Zero Rated Allowances?
  - Pay Point?  Coinage Analysis?  IRD Number?  Preferred Name?
  - Bank Account Details?  Transaction Dates?  Retain Print Range Selection?
  - Hourly Earnings Descriptions?  Transaction Comments?  Total Hours? (circled in pink)
  - Annual Salary?  Zero Rated Leave?
  - Print Company Name?  Zero Rated Ord. Hours?
- Payslip Message (15 lines maximum):** This is an area to write notes to all employees (you can also have individual notes). Payslips may be large (A4), compressed (then printed on A5 or onto IMS payslips) or in a windows envelope format. Options are also available for what you would like to appear on the payslip.

Here's how the total hours look on a payslip.

<b>Sample Company Limited</b>					
1002 ASHTON, Colin			TAX CODE	PERIOD END	
PAY POINT: Management			M	24/03/2024	
JOB TITLE: Office Manager					
<b>- H O U R L Y   E A R N I N G S -</b>					
	HOURS	BASE RATE		PAY RATE	VALUE
Ordinary Time	4.00	52.5000 x	1.0000	52.5000	210.00
22/03/2024	Keeping in Touch				
	(Total Hours: 40)		TOTAL TAXABLE:	210.00	

## Updating per pay rates for salaried employees

You can now use the **Hourly Rate Update** tool to change rates for multiple salaried employees at once by selecting the new **Salary (Per Pay)** option.

**Hourly Rate Update**

Stage 1 - Select Rate

**Rate Type:**

Minimum Wage    Current Per Pay Rate: \$1,275.00  
 Hourly Rate  
 **Salary (Per Pay)**    New Per Pay Rate: \$1,500.00

Rate to check: Hourly Rate 1  
 Include Terminated Employees?:

Check Salaried Employees

Stage 2 - Select Employees

Drag a column header here to group by that column

Select	Emp No	Employee	Age	Per Pay Rate	Pay Point	Status
<input checked="" type="checkbox"/>	1023	ZZREYNOLDS, Trevor		\$1275.00	Management	Terminated
<input checked="" type="checkbox"/>	1055	WHITE, Martin		\$1275.00	Management	No Birthdate

Select All    Unselect All    Update Employees    Back    Close

## Payment date for historical pays

You can see when an employee was paid by checking the new **Payment Date** column. The column is on the **History > Total Earnings** tab of the **Employee** screen.

IMS Sample Company Limited - MYOB IMS Payroll

File Edit View Tools Help

Company Employee Processing Sundry Reports

ASHTON, Colin

Emp# 1002    IRD# 020-981-899

Standard Payment Leave KiwiSaver Permanent HR / Notes Totals **History**

Total Earnings Leave Earnings KiwiSaver Timesheet History

From:    To:    Enter a Date Range to restrict History and Totals to that period.

Sick Leave Earnings	Other Leave Earning	Alternative Holiday E	Time in Lieu	Time in Lieu Earnings	FV Leave	FV Leave Earnings	Payment Date
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	22/11/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	29/11/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	06/12/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	13/12/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	20/12/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	27/12/2023
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	03/01/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	10/01/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	17/01/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	24/01/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	31/01/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	07/02/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	14/02/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	21/02/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	28/02/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	06/03/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	13/03/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	20/03/2024
\$0.00	\$0.00	\$0.00	0.00	\$0.00	0.00	\$0.00	27/03/2024
\$1,900.00	\$6,694.23	\$0.00	0.00	\$0.00	0.00	\$0.00	

Allows you to view part of History    Current Weekly Salary    Closed

## Employee listing includes family violence leave

The **Employee Listing** report can now include family violence leave values. To include the values, select **Full** in the **Detail Options** section of the report settings.

The screenshot shows the 'Sundry Reports' dialog box. On the left, 'Employee Listing' is selected. In the 'Detail Options' section, the 'Full' radio button is highlighted with a red circle. Other options in this section include 'Address', 'Pay Rates', 'Birthday', and 'Apprentice'. The 'Annual Leave Type' section has 'All' selected. The 'Print Options' section has 'Print Option Headers?' and 'Print Employee Counts?' checked. At the bottom, there are buttons for 'Print Screen', 'Print Setup...', 'Close', 'Print', and 'Preview'.

You can find the family violence leave near the bottom of the report.

Family Violence Leave					
Leave In: Days	Full Ent: 10.00	Next Ent: 10.00	Due Date: 02/11/2024	Months: 12	Balance: 10.00

## Changing payment settings in first pay of new tax year

You can now change payment settings for the first open pay of a new tax year. You're able to change the tax type, earnings type or if the payment is liable for ACC earnings.

**Note:** To safely reopen the first pay of the new tax year so you can run pays for the previous tax year, make sure you restore your end-of-year backup.

## Other improvements

- The 4 Week Average Rate (OWP4) – **Include in rate comparison** check box is now included in the **Employee Inquiry** screen.
- You can now choose Bank of China (88) when selecting a bank account for your company, employees or deductions.
- We added the data file extract option to several more reports and sundry reports, e.g. **Employee Payroll Summary**, **Timesheet History** and **Transaction Listing**.
- We've added two new columns to the leave section of the **Employee Inquiry** screen: **SL RSE Worker** and **SL RSE Accrued**.
- We fixed an issue where tabbing between fields on the **Employee > Leave > Annual Leave** screen was missing the **Next Entitlement Weeks** field.
- We increased the maximum amount of a single payment to pay or deduct. It's now 10 million dollars. Previously, it was 1 million dollars. Some reports might cut off parts of these large sums. If you encounter this, try using the A4 payslip format.

- For the **Timesheet History** sundry report, we added a new **Include \$ values?** checkbox, which is selected by default.

The screenshot shows the 'IMS Sundry Reports' dialog box. The 'Report' list on the left has 'Timesheet History' selected. The 'Print Options' section contains several checkboxes, with 'Include \$ Values?' checked and circled in pink. Other options include 'Print Report Summary?', 'Print Transaction Dates?', 'Print Pay Point Summary?', 'Print Employee Summary?', 'Print Option Headers?', 'Print Employee Detail?', and 'Print Terminated Employees?'. The 'Date Range' section has 'All' selected. The 'Transaction Selection' section has 'Exclude' selected. The 'Data File Extract?' section has 'Include Column Headers?' checked and 'Default Path?' unchecked. The file path is 'C:\Extracts\Timesheet\_History\_2024\_10\_30.csv'.

- For the **Pay Period Exceptions** report, the new **Sick Taken in Anniversary Pay** checkbox lets you list employees paid sick leave in the same pay as their sick leave rollover.

The screenshot shows the 'IMS Pay Period Exceptions - Report Options' dialog box. The 'Sick Taken in Anniversary Pay' checkbox is checked and circled in pink. Other options include 'Annual Leave Analysis' (with 'Negative Balance' checked), 'Tax Analysis' (with 'ND Tax Code' checked), 'Compare Last Pay' (with 'Compare Last Standard Pay?' checked), and 'Other' (with 'Check Days Worked (Perm/Set Hrs)' checked). The 'Pay Frequencies' section has 'All' selected. The 'Review Date' section has 'Pending' and 'Expired' checked. The 'Notes Follow Up' section has 'Pending' and 'Expired' checked.

- For the **Historical Trial Balance** sundry report, you can now choose to print multiple pay periods per page. To do so, select **Group by Period Ending Date?** and then *deselect* the new **New Page for each Period Ending Date?** checkbox.

The screenshot shows the 'Sundry Reports' dialog box with the following settings:

- Report:** Historical Trial Balance (selected)
- Sort Order:** Employee Name (selected)
- Print Range:** All (selected)
- Employee Range:** From: Pay Point: [dropdown], Employee: [dropdown]; To: Pay Point: [dropdown], Employee: [dropdown]
- Date Range:** All (selected), For: Period End Date (selected), From: [dropdown], To: [dropdown]
- Options:**
  - New Page for each Pay Point?
  - Group by Period Ending Date?
  - New Page for each Period Ending Date? (highlighted with a red box)
  - Print Totals Only?
  - Data File Extract? — Preview this report to have the Data File Extracted
  - Include Column Headers?
  - Default Path?
  - File Delimiter: CSV
  - File Path / Name: C:\Historical\_TrialBalance\_2024\_10\_30.csv

Buttons at the bottom: Print Screen, Print Setup..., Close, Print, Preview.