MYOB Advanced

Release Notes

2021.1.2

myob

Contents

Introduction

Welcome to the 2021.1.2 release of MYOB Advanced.

What's New in this Release?

The 2021.1.2 release adds features that enable MYOB Advanced People to integrate with the MYOB Advanced Workforce Management product and provides a range of other updates to the Advanced People module. This release also addresses issues identified in previous releases.

Installing this Release

The 2021.1.2 release is automatically deployed to all production accounts.

Upgrade Note: WFM Customisation

This release adds features to the integration with MYOB Advanced Workforce Management. These features were previously installed as a customisation to earlier versions of MYOB Advanced. Before upgrading to 2021.1.2, you must uninstall the **MYOB.Advanced.AT.2021.109.R2** customisation.

New Features

WFM Onboarding Integration

This release expands the integration between MYOB Advanced People and MYOB Advanced Workforce Management (WFM) introduced in the 2020.8 release to support the Workforce Management employee onboarding process. When employees are created in Advanced Workforce Management, matching employee records are now automatically created in Advanced People.

> **Note:** To integrate with Advanced Workforce Management, the "Work Force Management" feature must be enabled on the Enable/Disable Features screen (CS100000).

Integration features were introduced in the 2020.8.0 release. See the 2020.8 Release Notes for information on setting up Advanced People and Advanced Workforce Management to import timesheet data and include it in pay runs.

Setting up Integration

This release adds a new Workforce Management Preference screen (MPAT1010), which lets you set default values for details that aren't brought across by the integration:

The previous screenshot shows the Workforce Management Preference screen for Australian companies—in New Zealand, some of the fields differ:

Workforce Management Preferences ☆

* Employee Class:	GENERAL - Employee General
* Branch:	MAIN - Main
* Department:	ACCOUNTS - Accounts Department
* Calendar:	NZCALENDAR - New Zealand Calend
* Employee Numbering Sequence:	WFM
* Default Pay Group ID:	VINCE
Default Employee KiwiSaver Pay Item:	EMPEESUP
Default Employer KiwiSaver Pay Item:	EMPSUP
ACC Levy Exempt:	Acc Exempt

These settings must be configured before syncing employees from Advanced Workforce Management.

> Note: For New Zealand companies, the **Default KiwiSaver employer contribution** must be set in Advanced Workforce Management at **Management > Settings > Company Settings** before creating employees.

Synchronising Employee Records

Once the integration has been set up, any time an employee is created in Advanced Workforce Management, a matching employee record will be created in Advanced People. Employees can be created in two ways:

- By an employee following the Advanced Workforce Management onboarding process. When the employee clicks **Submit** at the end of the process, the information they entered is used to create the employee record in Advanced.
- By a manager clicking the **+** button on the Management > Employees screen in Advanced Workforce Management. After the manager completes the Add New Employee form and clicks **Add Employee**, the information they entered is used to create the employee record in Advanced.

In MYOB Advanced, the employee record is created with the following details:

- Employees screen (EP203000)
  - o The Personal Info, Contact Info and Address Info sections are populated with information entered by the employee during the onboarding process.
  - o The Employee Settings section is populated with the defaults from the Workforce Management Preferences screen (see page 2).
- Pay Details screen (MPPP2310)
  - o Pay items are added to the employee's Standard Pay
  - o Superannuation/KiwiSaver pay items are added to the employee's Standard Pay where possible—see "Synchronising Superannuation" on page 4
  - o The Pay Distribution tab is populated with the bank account details entered by the employee during the onboarding process.
  - o In Australia, the Taxation tab is populated with the TFN declaration details entered by the employee during the onboarding process.

o In NZ, the Definition of Week tab is populated with the employee's Standard Hours (if they exist).

The employee is initially set to Inactive—the record can be made Active once a payroll administrator has checked the record to make sure that it has all of the necessary information (see "Validating the Synchronisation" on page 5).

The employee record is assigned an Employee ID by Advanced People—this ID is displayed in Advanced Workforce Management in the **Reference** field on the employee's Personal Information tab:

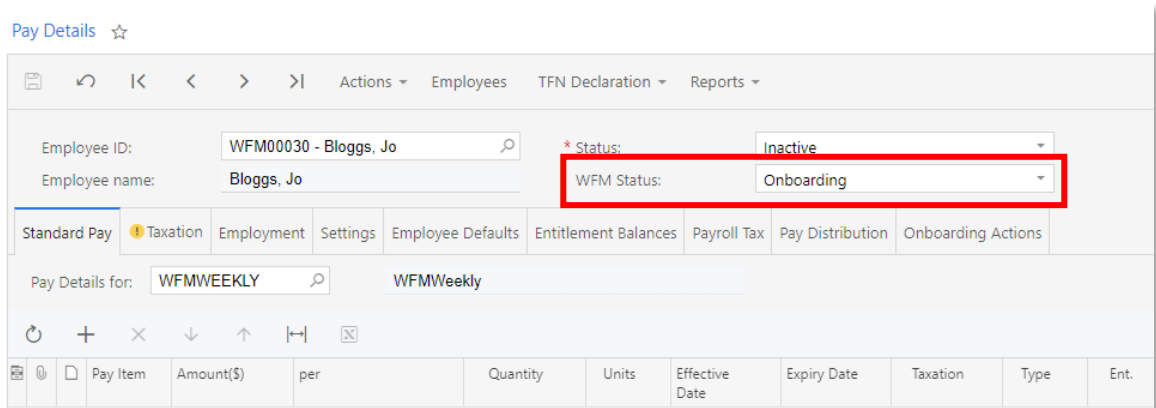## Synchronising Superannuation

When an employee is added from Advanced Workforce Management, superannuation pay items are added to their Standard Pay, as long as pay items that correspond to the employee's superannuation details exist in Advanced People. (If corresponding pay items don't exist, they should be created before syncing employees.)

- **In Australia**, if a pay item exists in Advanced People for the Super fund that the employee chose during the onboarding process, that super pay item will be added to their Standard Pay.
- **In New Zealand**, if a pay item exists in Advanced People for the KiwiSaver rate that the employee chose during the onboarding process, that KiwiSaver pay item will be added to their Standard Pay.

In both cases, if there is no pay item in Advanced People that matches the employee's superannuation information, an action will be displayed for this on the employee's Onboarding Actions tab (see "Onboarding Actions" on page 5).

Validating the Synchronisation

When an employee was added automatically from Advanced Workforce Management, a **WFM Status** field is available on the Pay Details screen (MPPP2310):
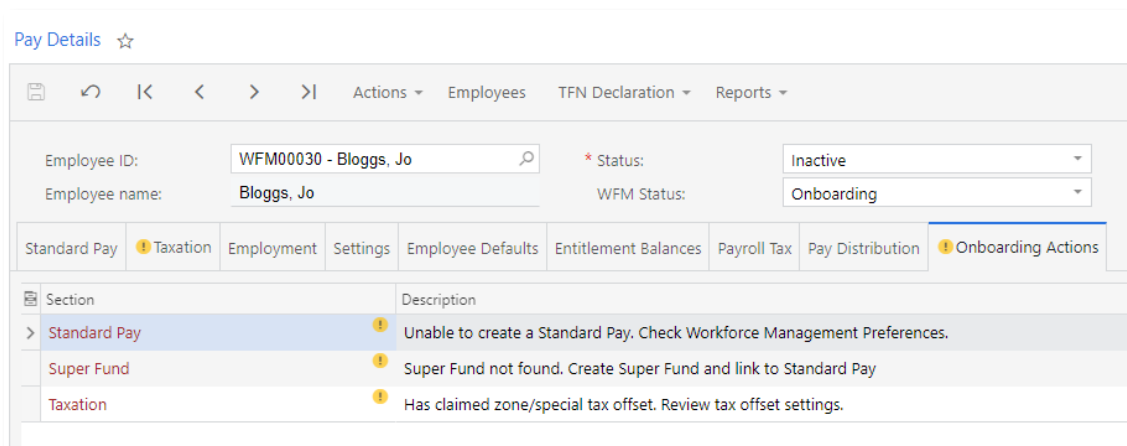

When the employee is first created, this field is set to "Onboarding". Once a payroll administrator has reviewed the new employee record and taken any actions necessary (see below), they can change the status to "Onboarded". The employee's **Status** cannot be set to "Active" until their **WFM Status** is "Onboarded".

Once the employee is Active, you can include them in pays in Advanced People and import timesheet data for the employee from Advanced Workforce Management into Advanced People.

Onboarding Actions

A new Onboarding Actions tab has been added to the Pay Details screen for employees who were added from Advanced Workforce Management. This tab displays any actions that a payroll administrator may need to take before activating the employee record, e.g. reviewing settings or adding missing information.

Employee Sync Issues Report

An Employee Sync Issues report is available in Advanced Workforce Management at **Management > Reporting > Employee**. This report displays any issues that occurred when Workforce Management attempted to send employee information to Advanced People.

If the sync failed because of a connection or setup issue, click the **Sync** link in the Actions column to resend the employee information to Advanced People.

If the sync failed due to errors in the employee's data, e.g. the employee has the wrong postcode for their country, a manager should update the employee's record on the Employees screen in Advanced Workforce Management; when they click **Update Employee**, the system will resync the employee's information with Advanced People.

Importing Employees

As in Advanced 2020.8, you can export employees from the MYOB Advanced People system via an export scenario and import them into MYOB Advanced Workforce Management from the **Settings > Importers > Import Employees** screen.

> Note: See **"Importing employees via Excel/CSV" on the MYOB Advanced Workforce Management Help Centre** for information on the import file specification.

This release adds a new **externalId** field to the exporter. When employees are exported from Advanced People and imported into Advanced Workforce Management, this field is used to stop the employee being synchronised back to Advanced People.

Advanced People

Updates to Entitlement Rollover Dates

New Zealand only

This release adds the ability for NZ companies to set custom entitlement trigger dates on a per-employee basis. (The entitlement trigger date when an employee becomes entitled and is used to calculate entitlement accruals and entitlement rollovers.) In previous releases, entitlements could be triggered per employee based on their start date; the ability to enter a custom trigger date for each employee allows for scenarios such as when an employee transitions from contract to permanent employment, which means their entitlement begins at the date of their transition, not their original start date.

In NZ companies, the **Trigger Date** field on the Entitlements screen (MPPP3300), has a new "Employee Specific" option, replacing the existing "Employee Start Date" option:

When the "Employee Specific" option is selected for an entitlement, the trigger date is taken from the employee's pay details. For NZ companies, the Employment tab of the Pay Details screen (MPPP2310) contains a new table that shows the trigger dates for all of the employee's entitlements:

For entitlements where the **Trigger Date Rule** is "Employee Specific", the trigger date defaults to the employee's start date; however, you can tick the box in the **Override** column, then enter a new date specific to the employee.

> **Note:** As with other entitlement settings, once the entitlement accruals have started through completed pay runs, changes to the trigger date value could result in incorrect accrual movements and rates. If you need to change the date, the recommended process is to create a new entitlement and entitlement adjustment to transfer existing accrued values.

Update to Entitlement Adjustments

New Zealand only

Entitlement Adjustments now include the ability to adjust an employee's accrued leave that was paid in advance. When creating an entitlement adjustment record, a new "Leave Paid in Advance" option is available in the **Type** column of the main table.

When an entitlement adjustment containing a "Leave Paid in Advance" line is released, the system generates an additional Entitlement Movement transaction with the reason "Normal Payment in Advance" (the other fields of the transaction behave as for an "Accrual Balance" line). The "Leave Paid in Advance" line does not generate a GL Batch transaction.

Attachment Orders

New Zealand only

This release adds support for District Court attachment orders in NZ companies. An attachment order tells an employer to transfer money from the debtor's wages or benefit to the creditor (WINZ or the Ministry of Justice).

You will be notified by the District Court if you need to add an attachment order for an employee. Attachment orders are set up as "Deduction" pay items and added to employees' pays in the same was as any other deduction.

New options for attachment orders are available on the Pay Items screen (MPPP2210):

- A new "Attachment Order" option has been added to the **Deduction Category** dropdown. Select this option to mark the deduction as an attachment order.
- When the "Attachment Order" option is selected, a new **Attachment Order Type** dropdown becomes available. Use this option to specify the kind of attachment order that this pay item should be used for. Choose from:
 - o Court Fine
  - o WINZ Order

The Protected Earnings options that are available for "Child Support" deductions are also available for attachment orders.

Default pay items for attachment orders are added to new NZ installs. "Court Fine" attachment order pay items should have the Ministry of Justice as their supplier, while "WINZ Order" attachment orders should have WINZ as their supplier. Default suppliers for these organisations are also added to new NZ installs.

Updates have been made to the Standard Pay tab of Pay Details screen (MPPP2310) and the Employee's Current Pay screen (MPPP3130) to support attachment orders:

- The **Child Support** column has been renamed to **Deduction Details**. This column now displays "Child Support" or "Attachment Order" to indicate the kind of deduction in each line. (For pay items that are neither of these, the column is blank.)
- When selecting an attachment order pay item, **Payment Reference**, **Code** and **Particulars** fields are available in the footer. These details are required for attachment orders so that payment can be made to WINZ or the Ministry of Justice—the required details will be given to you when you receive notice of the attachment order. (The **Payment Reference** field contains the same data as the **Payment Reference** column of the main table on this screen; changing one changes the other.)
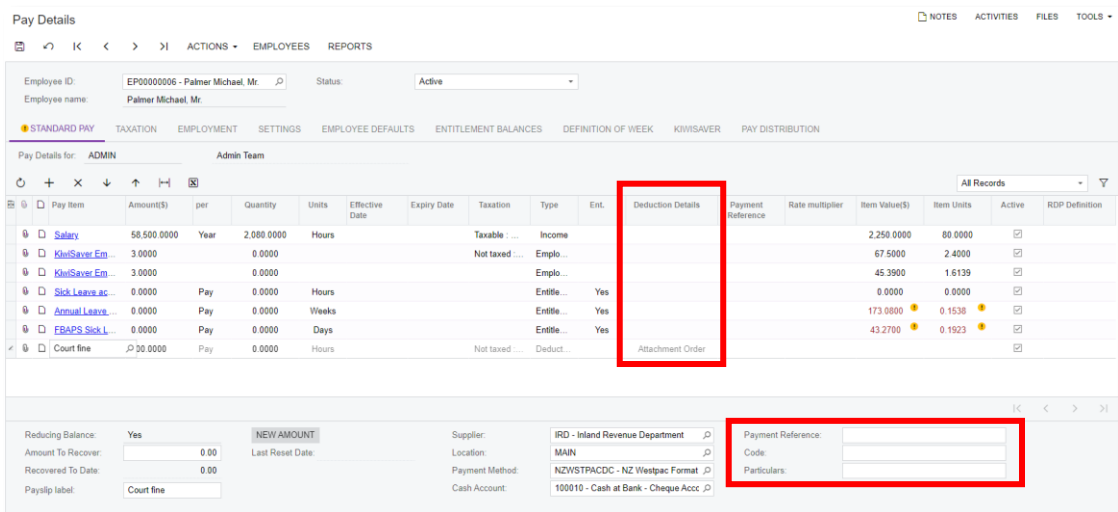
> **Note:** As per IRD directions, child support deductions are always deducted from employees' pay first. When adding these items to an employee's pay, attachment order pay items cannot be placed above child support pay items.

Multiple Leave Requests on One Day

MYOB Advanced People now supports the scenario where an employee has multiple, partial day leave requests in a single day, e.g. a two hour leave request in the morning and another two hour leave request in the afternoon. Leave can be added via the Self-Service portal or from the Employee's Current Pay screen (MPPP3130). Leave requests on the same day cannot add up to more than one day.

Leave requests on the same day are shown separately on the Employee Calendar screen (MPES4001).

> **Note:** The system supports leave requests of less than one day and requests of one or more whole days. Requests of 2.5 days, for example, are not supported—in this case, there would need to be two requests: one for two days and another for the extra half day.

Payroll Expense Allocation Settings

This release updates the payroll expense allocation features to support allocating leave, superannuation and WorkCover/ACC expenses.

The Expense Allocation Settings tab on the Payroll Preferences screen (MPPP1100) has been redesigned to support these updates:

- The existing **Group by Labour Item** and **Automatically Release Allocation** settings have been moved to a new Flow Settings Section.
- A new OnCost Allocation Settings section contains tick boxes that let you enable or disable the allocation of leave, superannuation and WorkCover/ACC expenses.
- The Fixed Allocation Settings and Time Allocation settings have been removed and replaced with a table that lets you set up as many allocation settings as required.

After upgrading to MYOB Advanced 2021.1.2, the table will contain entries for fixed and time-based costs for Income and Allowances, based on the settings you had previously—any other allocation settings will need to be added manually after upgrading. To add a new allocation settings entry:

1. Click the + button, then select the **Allocation Method**: Fixed or Time.
2. Select the **Allocation Type**. Choose from:
   - Income
   - Allowance
   - Superannuation
   - Leave
   - ACC/WorkCover
3. The remaining columns contain the same options that were available in previous versions. Use these to specify where the system should get the branch and expense accounts for allocations of this type.

> **Note:** As in previous versions, the **Branch Source** applies to time-based allocations only—this column is blank for fixed allocations.

This release also adds the ability to post quantities to the GL when allocating time-based expenses. A new **Update Quantity for Time Allocation** setting is available on the Additional Information tab of the Pay Items screen (MPPP221) for Income and Allowance pay items:

Update to Timesheet Imports

This release adds options to specify an external subaccount when importing timesheet data from MYOB Advanced time cards—in previous versions, the **Ext. sub account** column on the Import Timesheets screen (MPPP7030) would always be blank for lines that were imported from time cards.

A new **Subaccount Source** column is available on the Data Map Source Types screen (MPPP7001). For lines where the **Time Card type** option is ticked, this column contains a dropdown that lets you specify where to take the subaccount from when importing time card data using this source type:

Selecting an option from this columns means that the **Ext. sub account** column on the Import Timesheets screen will now be populated. Once the data is mapped, the values from the **Ext. sub account** column will be copied to the **Sub account ID** column as per your mapping rules.

Support for eSign

This release adds support for eSign features, so you can digitally sign any document attached to an MYOB Advanced record. Documents can be sent to external recipients for signing, and you can check their status to see when they have been signed. At present, MYOB Advanced supports the Adobe Sign e-signature service—more services may be added in future releases.

> **Note:** A separate licence is required to use eSign features.

Setting up eSign

When the eSign features have been licensed, an **ESign** option is available on the Enable/Disable Features screen (CS100000). Enable this option to activate the eSign features.

Setting up an Adobe Sign Account

You will need to set up an Adobe Sign account before setting up the eSign features in MYOB Advanced—see the Adobe Sign Quick Setup Guide for details. When setting up the account to integrate with MYOB Advanced, you must perform the following steps:

1. Go to **Account > Adobe API > Applications**.
2. Click **Create** and create a CUSTOMER application. Give this application a **Name** and **Display Name** that describe the MYOB application.
3. Select the new application and click View/Edit, then copy down the **Client Secret**.
4. Select the application and click Configure OAuth for Application. On the Configure OAuth window:
   a. Copy down the **Client Secret**.
   b. In the **Redirect URI** field, enter:
      `https://[URL of your MYOB Advanced site]/Pages/MB/ES/ESign.aspx`
      e.g. https://demo.myobadvanced.com/Pages/MB/ES/Esign.aspx
   c. Tick the **Enabled?** boxes for the following scopes:
      - user_login
      - agreement_read
      - agreement_write
      - agreement_sent
      - workflow_read
      - workflow_write
   d. Set the **Modifier** fields for these scopes to "account".

Setting up MYOB Advanced for eSign

Once you have set up the Adobe Sign account, go to the eSign Accounts screen (MBES3010) and set up an account for each individual or group of individuals who you want to use the eSign features.

To set up a new account:

1. Click the **+** button on the eSign Accounts screen.
2. Select a **Type**: Individual or Shared.
   - For an Individual account, select the user who will use the account in the **Advanced User Name** field.
   - For a Shared account, use the Users tab to select the users who will share this account.

   Note: Users must be set up as Employees in the MYOB Advanced system.

3. In the Adobe URL field, enter `https://secure.au1.adobedesign.com/`
4. Enter the client ID and secret you copied down from the Adobe Sign setup into the **Client ID** and **Client Secret** fields.
5. Select whether or not to send automatic daily or weekly reminders to the recipients of documents that need to be signed.
6. Enter the number of days before a request to sign a document will expire.

Once the account is set up, you can click **Connect** to test the connection to Adobe Sign.

Sending Documents for Signing

When logged in as a user who has been associated with an account on the eSign Accounts screen, you can access the eSign features on any record that can have documents attached to it, i.e. on any screen that has a **Files** menu.

When you open a file attachment on the File Maintenance screen (SM202510), an **eSign** button is available, if the logged in user is associated with an eSign account. Clicking this button opens the eSign Envelope window, where you can an email to one or more recipients, requesting that they digitally sign the document:
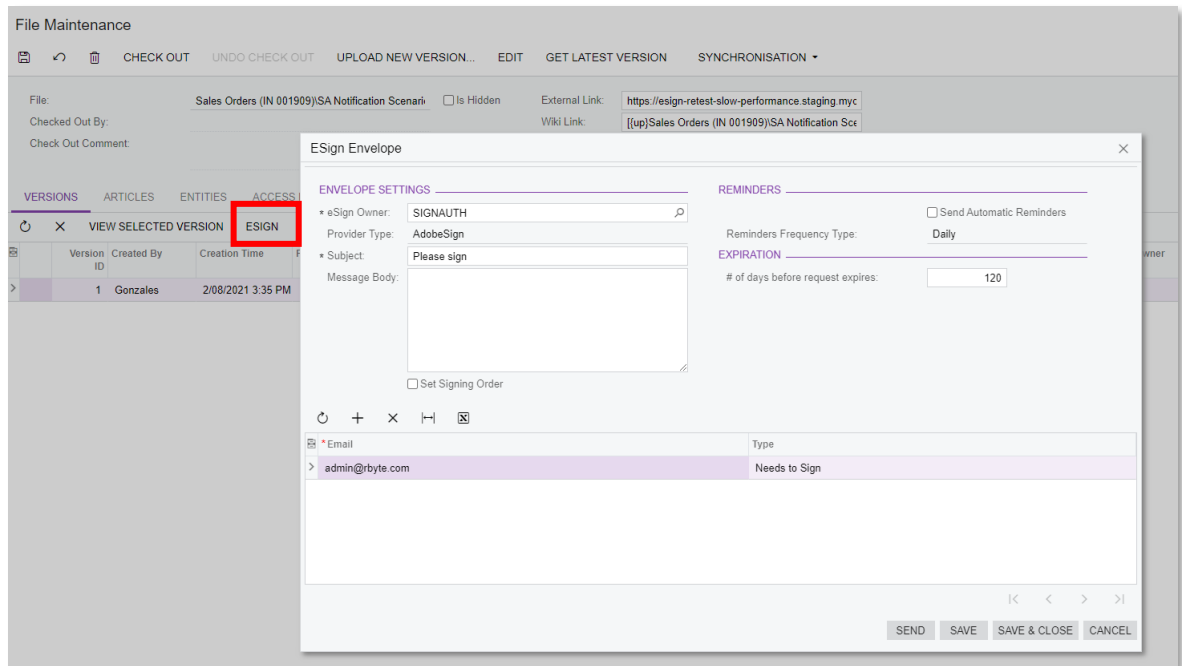
Enter a **Subject** and **Message Body** for the email and add email recipients as necessary. The Type dropdown lets you specify whether recipients need to sign the document, or will simply receive a copy of it. When you are ready, click **Send**. A new window opens, showing the document being uploaded to the e-signature service—from this window you can send the document to the recipient(s).

Checking Document Statuses

The main table on the Versions tab of File Maintenance screen (SM202510) has new columns that show the eSign status of the document:
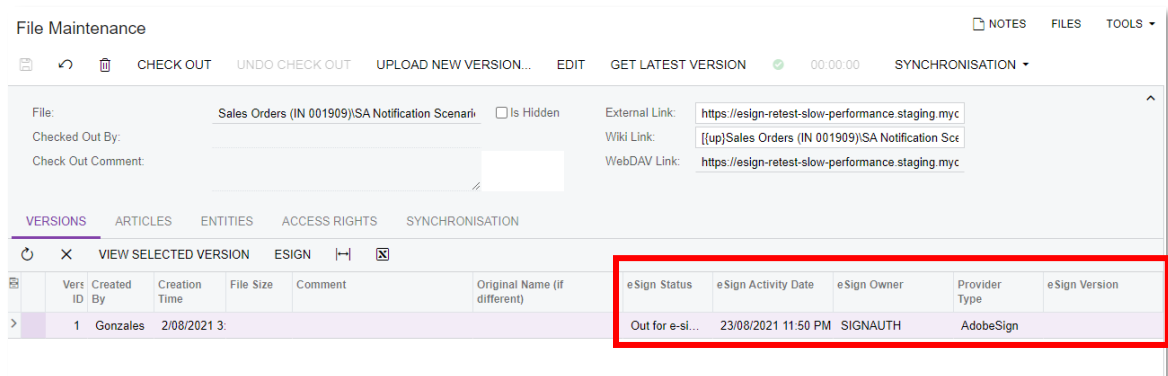
Use the eSign Central screen (MBES4010) to check the status of any documents that have been sent for signing and manually send reminders if necessary:

You can also use the eSign Sync screen (MBES5010) to poll the e-signature service and update the statuses of any documents that are awaiting signatures:

You can set up an automation schedule for this screen to update documents' statuses regularly.

Resolved Issues

The following tables detail the issues that are addressed by this release.

Payroll and Self-Service

Problem ID	Description
CE00013532 CE00013238 CE00013902 CE00014981 CE00015002 CE00015665 CE00015733 CE00015812	Import scenarios set up to import pay distribution data for employees failed with the error "Column 'PayType' cannot be null", but it was not possible to specify a pay type when setting up the import scenario. This has been resolved.
CE00017944 CE00017892 **CE00017472** CE00017463 **CE00017481** CE00017459	This release improves system performance when opening, saving and moving between employee records.
CE00017317 CE00017292 CE00018416	In some cases, the screen-based API failed to update employees' Pay Details. This has been resolved.
CE00014831 CE00014734	This release adds the ability to enter multiple partial day leave requests for the same day—see page 8.
CE00017664 CE00017327	The error "Cannot get tax type display text for net pay effect" could occur when trying to change the limit on a pay item. This has been resolved.
CE00017417 CE00017327	The error "Object reference not set to an instance of an object" could appear on the Employee Transfer screen (MPPP3115) when clicking **Populate Entitlement Balances**. This has been resolved.
CE00017175 CE00016883	In some cases, an error occurred when using a custom API to update employees' Pay Details. This has been resolved.
CE00016572 CE00016467	In NZ companies, the wrong quantity could be paid when a leave entitlement was set up in Hours, and the employee was taking less than one day of leave. This has been resolved.
CE00015434 CE00015411	The error "No working days found for employee's definition of week. Notional date cannot be calculated based on earned leave." could appear when trying to terminate an employee, when the employee's Definition of Week was defined. This has been resolved.
CE00015230 CE00015199	Leave entered in the Self-Service module did import into pay runs correctly if the affected employees' pays did not include an income pay item. As a workaround, an income pay item with the Amount or Quantity set to zero could be added to employee's Standard Pays. This has been resolved; leave now imports correctly, removing the need to add extra items to Standard Pays.
CE00018447 CE00018323	An error could occur on the Leave Request screen (MPES3021) when sorting the main table by employee. This has been resolved.
-	On NZ companies, the menu link to the Payslip report (MPPP7000) linked to the Australian version of the report (MPPP6080). This has been resolved.

Problem ID	Description
-	This release address issues with the Payslip and Pay Summary in NZ companies: • Student Loan amounts were missing from the PAYE amount and YTD amount on the Payslip. • Student Loan amounts were missing from the PAYE amount on the Pay Summary. • The Pay Summary included employee KiwiSaver in two columns, which meant that the totals did not add up.