



Take your business to the **next level**

MYOB EXO Business

MyStaff Info

-For Managers



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This training manual has been developed by the MYOB Enterprise Division implementation team for use in the delivery of training.

This manual uses a simple step-by-step approach to give you the skills and knowledge necessary to use the EXO MyStaffInfo system.

This manual has been designed for the following MYOB product:

- EXO MyStaffInfo

MYMSI

EXO MyStaffInfo for Managers

EXO MyStaffInfo

Course duration: 1.0 hrs

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Edition: **2011.01**

Participants

This course is aimed at:

- Users of EXO MyStaffInfo.

Prerequisites

Basic PC experience is required.

Instructional method

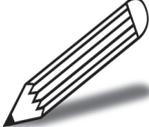
The instructional method combines trainer-led demonstrations with actual system configuration. Each unit concludes with a Review Task.

Conventions used in this manual

- Objects such as buttons or icons that you must click or select are shown in **bold**.
- Information to be entered (typed in) or selected, is shown in ***bold and italics***.
- Keyboard keys are shown as **TAB**, **CTRL**, etc.

Screenshots in this manual are for illustration purposes only and may differ from those in the actual product due to configuration settings.

Symbols used in this manual

Symbol	Name	This symbol tells you...
	Practice task Review task	... to complete a task to practice the skills you have just learnt, or as a review task at the end of the unit to consolidate what you have learnt.
	Written Review task	... to complete written questions to review the content covered in the unit.
	Optional Challenge	... to complete this task if you have finished early and are looking for an extra challenge.
	Tip	... about helpful tips.
	Note	... to take note of an important message.
	Warning	... about potential problems to be aware of.
	Important	... to pay attention to an important notice.
	New	... where features are new for EXO MyStaffInfo.
	Reference	... where to go to find more information.
	Skills Checklist	... to tick off a list of skills that you have learnt during the unit.

Objectives

In this course you will learn how to utilise EXO MyStaffInfo.

Upon completion of this course you will be able to:

- Approve Leave Requests
- Approve Timesheets

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Introduction to MyStaffInfo

1

In this unit you will learn about the different areas of EXO MyStaffInfo.

By the end of this unit, you will be able to:

- ▶ Access the MyStaffInfo website

Introduction

With the increasing popularity of the Internet and advances in technology, at some stage your company will reach a point where you want your employees to be able to access their own information, electronically apply for leave, fill in their timesheets, etc.

EXO MyStaffInfo provides you with this functionality. MyStaffInfo is an internet- based employee self-service system, allowing employers and employees to communicate via the internet, without concerns about security, infrastructure or resource issues.

Employees can access their payslips, view their leave entitlements, apply for leave, read memo and update their own information. They can even enter timesheets.

An online locator board and company phone list area is also available to employees.

All of this can be accessed from any computer with internet access.

MyStaffInfo Website

The MyStaffInfo website is where employee's can:

- Access their personal information
- Apply for leave
- View their payslips
- Access Timesheets
- Securely communicate with other employees

To access the MyStaffInfo Website

- 1 Open you internet browser
- 2 In the **Address Bar**, enter the address ***http://mystaffinfo.myob.com***.



The screenshot shows the MyStaffInfo login interface. At the top, the logo reads "MyStaffInfo by MYOB". Below this is a header "Login to MyStaffInfo". The login form contains three input fields: "Company:", "User Name:", and "Password:". A green "Login" button is positioned below the password field. At the bottom of the form, there is a link that says "Forgotten your password?".



Skills checklist

Tick the skills that you have learned in this unit.

Skills	<input checked="" type="checkbox"/>
Access the MyStaffInfo Website	<input type="checkbox"/>

MyStaffInfo website

2

In this unit you will learn how to log onto the EXO MyStaffInfo website.

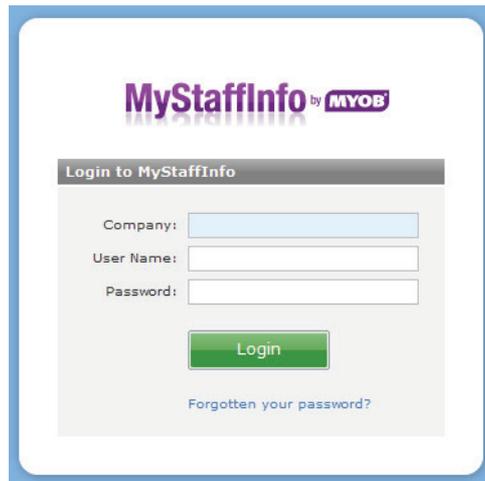
By the end of this unit, you will be able to:

- ▶ Log onto the EXO MyStaffInfo website

To log in on the MyStaffInfo Website

To log in

- 1 Access the MyStaffInfo website.

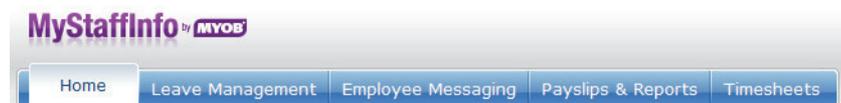


- 2 In the **Company** field, enter your company number. This number is provided to you by your payroll department.
- 3 In the **Email** field, enter the user's e-mail address.
- 4 In the **Password** field, enter the user's password.
- 5 Click on the **Log In** button.

To Log Out

- 1 Click on **Log Out** link in the top right-hand corner of the screen.

Navigating



To navigate to any area on the website, use the toolbar located at the top of the screen.

Home

Dashboard

This area is the main screen of MyStaffInfo. The Dashboard is a quick way to access commonly used areas, e.g. Payslips, Leave, Timesheets.

Contact Details

This area allows the employee to view and/or change their contact details. Managers can also have access to view and/or change the address details of their subordinates.

Locator Board

This area lets you keep track of employees' location.

Phone List

This area provides you with a list of employees and their contact phone number.

Leave Management

Leave Balances

This area shows the employee their balances for the various leave types. Managers can also have access to view the leave balances of their subordinates.

Leave Calendar

In this area, managers can view the leave their employees have applied for in a calendar format.

Make Request Leave

In this area, the employee view their leave balances as well as apply for leave.

My Leave Requests

In this area, the employee can view all the leave requests they have made.

Manage Leave Requests

In this area, managers can approve/decline their subordinates' leave requests.

Employee Messaging

Send Message

From this area, employee can send message to another employee.

Inbox

This screen shows all the message the employee received.

Sent Items

This screen shows all the message the employee has sent.

Post News

In this screen the employee can send a message to all employees.

Payslips & Reports

In this area the employee can view payslips or any EXO Employer Services report uploaded to the MyStaffInfo website for their access.

Timesheet

Group Summary

This screen shows a summary of the timesheets entered by the manager's subordinates.

My Timesheet

In this area the employee would enter their timesheet information.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	<input checked="" type="checkbox"/>
Log In on the EXO MyStaffInfo website	<input type="checkbox"/>

MyStaffInfo - Leave Management

3

In this unit you will learn how to approve or decline leave requests.

By the end of this unit, you will be able to:

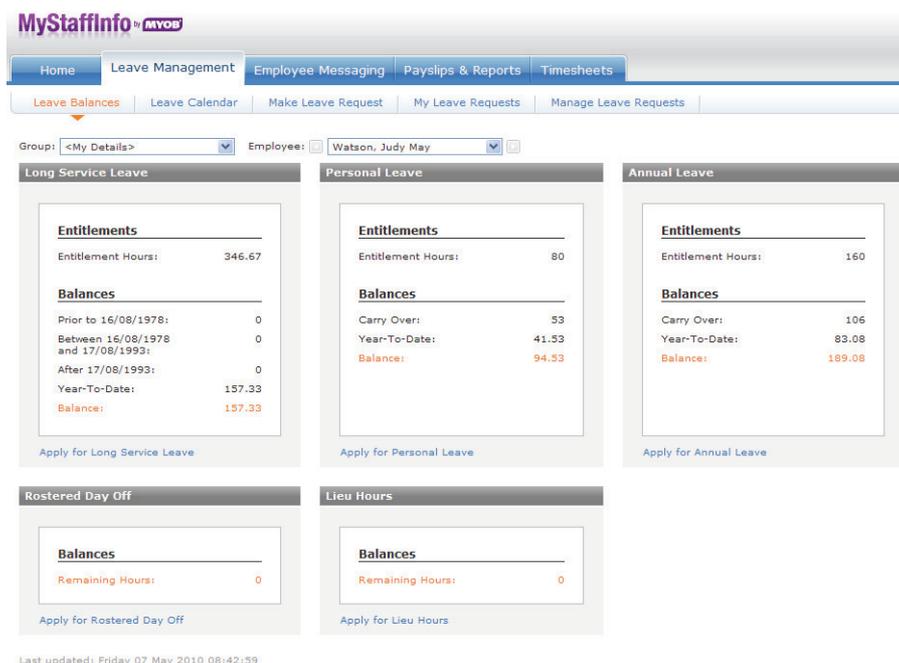
- ▶ View leave balances
- ▶ View the leave calendar
- ▶ Manage leave requests

Leave Balances

Employees can view their leave balances from the MyStaffInfo Website. The Leave Types they can view will be determined by their access rights.

To access the Leave Balances section

- 1 Under the **Leave Management** section, click on **Leave Balances**.



The user will see all the balances of the leave types to which they have been given access to view. Users can apply for leave by clicking on the *Apply for X leave* link below the appropriate leave type.

NOTE



Users can also apply for leave under the *Make Leave Request* section.

To view another user's leave balances (*Managers only*)

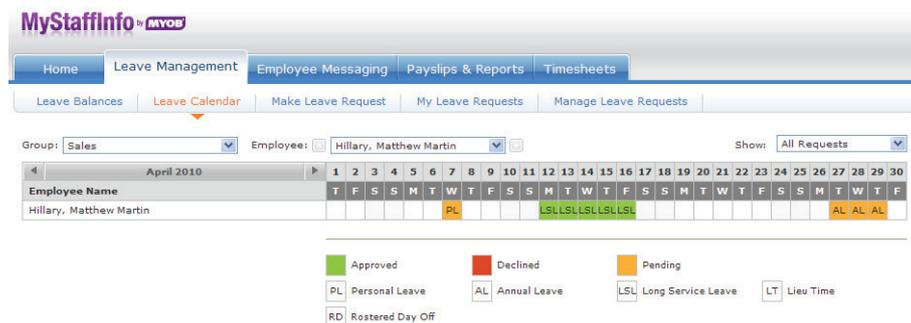
- 1 From the **Group** dropdown list, select the **Group** of employees you want to access. From the **Employee** dropdown select the employee whose contact details you want to access.

Leave Calendar

The Leave Calendar lets the employee view all their leave requests in calendar format. If the employee is also a manager, they can view the leave requests of all their subordinates as well.

To access the Leave Calendar

- 1 Under the **Leave Management** section, click on **Request Calendar**



To view your leave calendar (*Managers only*)

- 1 From the **Group** dropdown list, select **<My Details>**. The **Employee** dropdown list will display the user's name.

To view your subordinates' leave calendar (*Managers only*)

- 1 From the **Group** dropdown list, select the **Group** of employees you want to access.

Manage Leave Requests

This area will show all the leave requests sent to this manager.

New Leave Requests

This section shows all the new leave requests waiting to be approved.

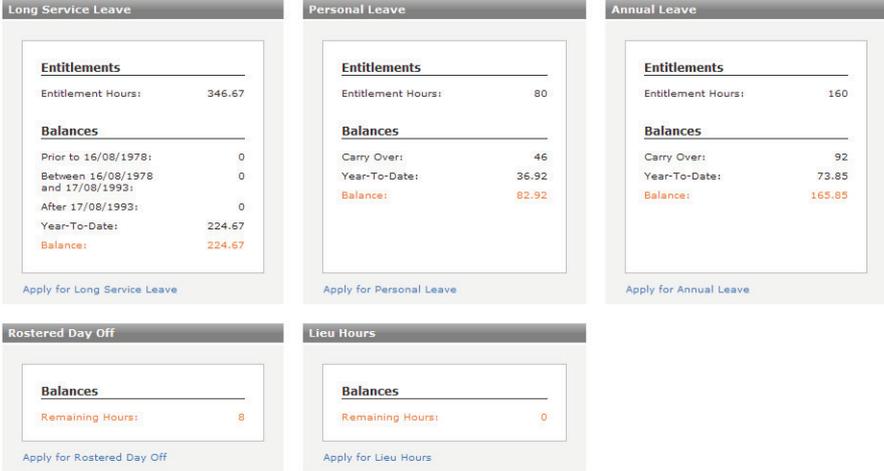
Leave Type	Total Units	Date From	Date Until	Sent by	Date Created	Status
Personal Leave	8 Hours	06/05/2010	06/05/2010	Hillary, Matthew Martin	06/05/2010	Pending
Long Service Leave	40 Hours	12/04/2010	16/04/2010	Hillary, Matthew Martin	30/04/2010	Accepted
Personal Leave	8 Hours	07/04/2010	07/04/2010	Hillary, Matthew Martin	30/04/2010	Pending
Annual Leave	24 Hours	27/04/2010	29/04/2010	Hillary, Matthew Martin	30/04/2010	Pending

From the **Show** dropdown list, select the type of leave requests to view:

All Requests	Show all the leave request.
Approved Requests	Only show leave requests that have been approved
Declined Requests	Only show leave requests that have been declined
Pending Requests	Only show leave requests that are still pending

To check an employee's leave balances.

- 1 Click on the  button.



The screenshot displays five panels showing leave balances for an employee:

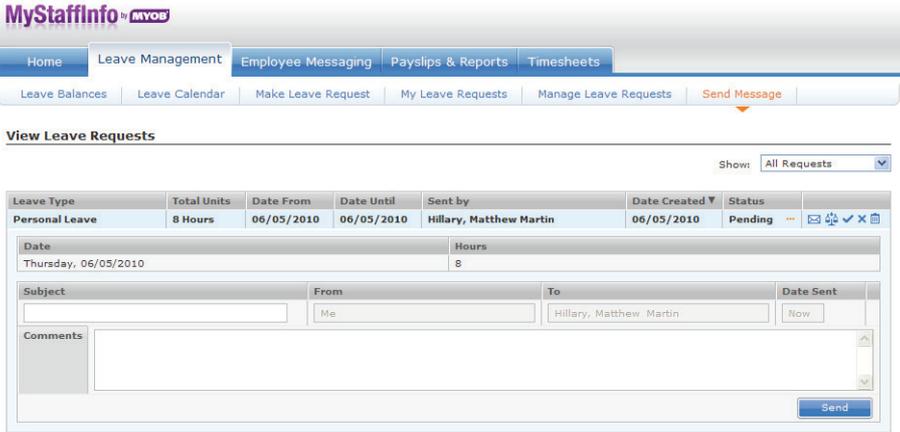
- Long Service Leave:**
 - Entitlements: Entitlement Hours: 346.67
 - Balances:
 - Prior to 16/08/1978: 0
 - Between 16/08/1978 and 17/08/1993: 0
 - After 17/08/1993: 0
 - Year-To-Date: 224.67
 - Balance: 224.67
- Personal Leave:**
 - Entitlements: Entitlement Hours: 80
 - Balances:
 - Carry Over: 46
 - Year-To-Date: 36.92
 - Balance: 82.92
- Annual Leave:**
 - Entitlements: Entitlement Hours: 160
 - Balances:
 - Carry Over: 92
 - Year-To-Date: 73.85
 - Balance: 165.85
- Rostered Day Off:**
 - Balances: Remaining Hours: 8
- Lieu Hours:**
 - Balances: Remaining Hours: 0

At the bottom, it states: Last updated: Friday 07 May 2010 08:42:59

- 2 The above screen is displayed, allowing you to check the employee's relevant leave balance before approving the leave request.

To send a message to the employee regarding their request

- 1 Click on the  button.



The screenshot shows the 'Send Message' form in the MyStaffInfo interface. The navigation bar includes: Home, Leave Management, Employee Messaging, Payslips & Reports, Timesheets. The 'Send Message' button is highlighted in red.

View Leave Requests (Shows: All Requests)

Leave Type	Total Units	Date From	Date Until	Sent by	Date Created	Status
Personal Leave	8 Hours	06/05/2010	06/05/2010	Hillary, Matthew Martin	06/05/2010	Pending

Date: Thursday, 06/05/2010 **Hours:** 8

Subject: [Empty field] **From:** Me **To:** Hillary, Matthew Martin **Date Sent:** Now

Comments: [Large text area]

Send button

- 2 In the **Subject** field, enter a topic for the message.
- 3 Enter a message in the **Comments** field.
- 4 Click on the  button.

To approve a leave request

- 1 Click on the  button for the specific leave request you want to approve.

Leave Type	Total Units	Date From	Date Until	Sent by	Date Created	Status	
Personal Leave	8 Hours	06/05/2010	06/05/2010	Hillary, Matthew Martin	06/05/2010	Pending	

Date	Hours
Thursday, 06/05/2010	8

Subject	From	To	Date Sent
Leave Request Accepted	Me	Hillary, Matthew Martin	Now

Comments

- 2 Enter a message in the **Comments** field.

- 3 Click on the button.

To decline a leave request

- 1 Click on the  button for the specific leave request you want to decline.

Leave Type	Total Units	Date From	Date Until	Sent by	Date Created	Status	
Personal Leave	8 Hours	06/05/2010	06/05/2010	Hillary, Matthew Martin	06/05/2010	Pending	

Date	Hours
Thursday, 06/05/2010	8

Subject	From	To	Date Sent
Leave Request Declined	Me	Hillary, Matthew Martin	Now

Comments

- 2 Enter a message in the **Comments** field.

- 3 Click on the button..

To delete a leave request

- 1 Click on the  button for the specific leave request you want to delete.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	<input checked="" type="checkbox"/>
View leave balances	<input type="checkbox"/>
View the Leave Calendar	<input type="checkbox"/>
Approve a Leave Request	<input type="checkbox"/>
Decline a Leave Request	<input type="checkbox"/>

MyStaffInfo - Timesheets

4

In this unit you will learn how to enter timesheet information and approve timesheets

By the end of this unit, you will be able to:

- ▶ Enter Timesheet information
- ▶ Approve Timesheets

Overview

On the MyStaffInfo website, employees can enter their timesheet information electronically. This information can be entered as a combination of the following options:

- Timesheets with start times, finish times and break lengths
- Total Wage hours
- Leave
- Allowances

Group Summary (managers only)

This section gives managers an overview of their subordinates' timesheets.

Pay Status	Employee	Time Hours	Wage Hours	Allow. Units	Personal Leave Hours	Annual Leave Hours	Long Service Leave Hours	Lieu Hours	RDO Hours Taken	Hours Paid
●	Hillary, Matthew Martin	7.60	0	5 †	7.60	-	-	-	-	-
	Totals:	7.60	-	5 †	7.60	-	-	-	-	-

‡ Amount
 * Rate
 † Units

Print

To view the timesheets associated with a particular pay period, select the appropriate period from the **Pay** dropdown list.

From the **Group** dropdown, the manager can select to view their own timesheet, or the group that reports to them.

By clicking on the **Approve Group** button, the manager can approve all the timesheets shown in the list. By clicking on the **Unapprove Group** button, the manager can unapprove all the timesheets shown in the list.

The **Pay Status** indicates the whether the employee's timesheet has been approved (green) or declined (red).

To view the details of a specific employee's timesheet entry, click on any of the hours/units listed in their summary.

Entering Time

In this area employees would enter their timesheet. Managers have the ability to modify/overwrite an employee's timesheet in this area as well.

Select from the following filters: (*managers only*)

- 1 From the **Group** dropdown list, select either **My Details** to view your own details, or select a specific **Group** to view the timesheets for employees in that group.
- 2 From the **Employee** dropdown list, select the **employee** in the group whose timesheet you want to view.

TIP



You can also click on the  and  buttons to navigate between the previous and next employee.

- 3 Click on the  button to apply the filters you have selected.

Select from the following timesheet filters:

- 1 From the **Pay** dropdown list, select the appropriate pay period (batch)
- 2 From the **Show** dropdown list, select one of the following options:

All	Show all timesheet entries
Approved	Only show timesheet entries that have been approved.
Unapproved	Only show timesheet entries that are unapproved.

- 3 Click on the  button to apply the filters you have selected.

To enter Timesheets

- 1 Select **Timesheet** from the **Type** dropdown list and click on the  button.
- 2 The following window will appear:

Enter the number of Entries to add:

- 3 Enter the number of entries you wish to add and click on the **OK** button.
- 4 The appropriate fields will be displayed, allowing you to enter the relevant information based on the type of entry you are making.

The screenshot shows the 'Add Time' dialog box. At the top, 'Type' is set to 'Timesheet' and there is an 'Add Entries' button. Below this is a table with the following columns and values:

Date	Start	End	Break	Units	Wage Type	Rate Code	Cost Centre
10/05/2010	00:00	00:00	00:00	00:00	Ordinary	1	0 Employee Default

At the bottom right of the dialog is a green 'Submit to Manager' button.

- 5 In the **Date** field, enter the date of the transaction.
- 6 In the **Start** field, enter the time the employee started on this day.
- 7 In the **Finish** field, enter the time the employee finished on this day.
- 8 In the **Break** field, enter the total length of unpaid breaks the employee had on this day.
- 9 From the **Wage Type** dropdown list, select the **Wage Type** these hours should be paid at, e.g. Ordinary Time.
- 10 If your MYOB EXO Payroll is set up to allow different hourly rates for for each employee, an additional dropdown list will be available to select the **Rate Code** at which the hours should be paid.
- 11 If you wish to cost these hours to a Cost Centre other than the employee's default, select the appropriate cost centre from the **Cost Centre** dropdown list.
- 12 Click on the **Submit to Manager** button to add this record.
- 13 The entry will move to the **Timesheet** section.

To enter Wages

- 1 Select **Wages** from the **Type** dropdown list and click on the **Add Entries** button.
- 2 The following window will appear:

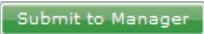
The screenshot shows a dialog box with the text 'Enter the number of Entries to add:' followed by a text input field containing the number '1'. Below the input field are two buttons: 'OK' and 'Cancel'.

- 3 Enter the number of entries you wish to add and click on the **OK** button.
- 4 The appropriate fields will be displayed, allowing you to enter the relevant information based on the type of entry you are making.

The screenshot shows the 'Add Time' dialog box with 'Type' set to 'Wages'. The table below has the following columns and values:

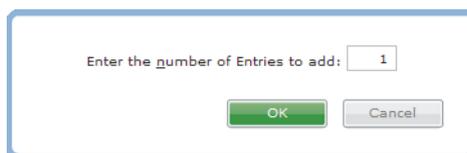
Date	Units	Wage Type	Rate Code	Cost Centre
10/05/2010	0.00	Ordinary	1	0 Employee Default

At the bottom right of the dialog is a green 'Submit to Manager' button.

- 5 In the **Date** field, enter the date of the transaction.
- 6 In the **Units** field, enter the **hours** the employee worked on this day.
- 7 From the **Wage Type** dropdown list, select the **Wage Type** these hours should be paid at, e.g. Ordinary Time.
- 8 If your MYOB EXO Payroll is set up to allow different hourly rates for for each employee, an additional dropdown list will be available to select the **Rate Code** at which the hours should be paid.
- 9 If you wish to cost these hours to a Cost Centre other than the employee’s default, select the appropriate cost centre from the **Cost Centre** dropdown list.
- 10 Click on the  button to add this record.
- 11 The entry will move to the **Wages** section.

To enter Leave

- 1 Select **Leave** from the **Type** dropdown list and click on the  button.
- 2 The following window will appear:



- 3 Enter the number of entries you wish to add and click on the **OK** button.
- 4 The appropriate fields will be displayed, allowing you to enter the relevant information based on the type of entry you are making.



- 5 In the **Date** field, enter the date of the transaction.
- 6 From the **Type** dropdown list, select the appropriate **Type** of leave.
- 7 In the **Units** field, enter the number of units of leave taken.

TIP

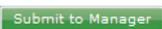


You can click on the  button if you’re not sure if the units should be entered as **Days** or **Hours**.

- 8 In the **Reduce** field, enter the number of units by which your entitlement should be reduced.

NOTE

The **Units** and **Reduce** field normally have the same value, as the entitlement is reduced by the same number of units of leave taken.

- 9 If you wish to cost these hours to a Cost Centre other than the employee's default, select the appropriate cost centre from the **Cost Centre** dropdown list.
- 10 Click on the  button to add this record.
- 11 The entry will move to the **Leave** section.

To enter Allowances

- 1 Select **Allowances** from the **Type** dropdown list and click on the  button.
- 2 The following window will appear:

- 3 Enter the number of entries you wish to add and click on the **OK** button.
- 4 The appropriate fields will be displayed, allowing you to enter the relevant information based on the type of entry you are making.

Date	Code	Units	Cost Centre
10/05/2010	Bonus	0.00	2030 NSW/BONUS

- 5 In the **Date** field, enter the date of the transaction.
- 6 In the **Code** dropdown list, select the appropriate **Allowance**.
- 7 In the **Units** field, enter the number of units of the Allowance that should be paid.
- 8 Click on the  button to add this record.
- 9 The entry will move to the **Allowances** section.

Hours Paid for Part-Timers (New Zealand version only)

If the employee accrues their Holiday Pay on a pro-rata basis, they also need to enter the number of hours/days they are paid for on their timesheet.

To enter Hours/Days Paid

- 1 Select **Other** from the **Type** dropdown list and click on the  button.

2 The following window will appear:

3 Enter the number of entries you wish to add and click on the **OK** button.

4 The appropriate fields will be displayed, allowing you to enter the relevant information based on the type of entry you are making.

5 In the **Date** field, enter the date of the transaction.

6 In the **Units** field, enter the number of hours/days on which the employee will accrue leave.

7 Click on the **Submit to Manager** button to add this record.

8 The entry will move to the **Other** section.

TIP



You can print the timesheets by clicking on the **Print** button at the bottom of the screen.

Editing Timesheet information

Changes can be made to all the timesheet information until it has been approved by a manager.

To edit timesheet information

- 1 Move your mouse of the transaction you wish to edit.
- 2 Click on the  icon.
- 3 Make any required changes.
- 4 To save the changes, click on the  button.
- 5 To cancel the changes, click on the  button.

To delete an individual transaction

- 1 Move your mouse of the transaction you wish to delete.
- 2 Click on the  icon.
- 3 A message will appear to confirm that you wish to delete this leave request. Click **Yes** to delete the leave request.

History

Employees (and managers) can, at any time, view historical timesheet.

To view historical timesheets

- 1 Click on **History** tab.

- 2 From the **Pay** dropdown menu, select the pay (batch) you want view historical timesheets for.
- 3 In the **Show Entries From** section, enter a start and end date range for the period you wish to view historical timesheets for.
- 4 From the **Pays** dropdown menu, select whether you wish to view historical timesheets for pay batches that are **Open**, **Closed** or **Both**.
- 5 From the **Downloaded** dropdown list, select whether you wish to view historical timesheets that have been downloaded (**Yes**), not yet downloaded (**No**) or all timesheets (**Both**).
- 6 From the **Approved** dropdown list, select whether you wish you view timesheets that have been approved (**Yes**), not approved (**No**) ro all timesheets (**Both**)
- 7 Click on the **Update** button.
- 8 All the timesheets entries that meet the above criteria will be displayed.

Approving and Declining Timesheets (managers only)

Approving and Unapproving Timesheets

Once employees have entered their timesheets, their respective managers must approve the timesheets before they can be downloaded to the payroll.

The screenshot shows the 'Timesheets' section of the MyStaffInfo system. At the top, there are navigation tabs: Home, Leave Management, Employee Messaging, Payslips & Reports, and Timesheets. Below these are sub-tabs: Group Summary, Enter Time, and History. The main area contains several controls: a 'Pay' dropdown set to 'P/E 18/04/2010', a 'Starting Monday, 12 April 2010' label, and buttons for 'Approve Group' and 'Unapprove Group'. Below that, a 'Group' dropdown is set to 'Sales', an 'Employee' dropdown is set to 'Hillary, Matthew Martin', and buttons for 'Approve Emp' and 'Unapprove Emp'. There is also a 'Show' dropdown set to 'All' and an 'Update' button. Below these controls is an 'Add Time' section with a 'Type' dropdown set to 'Timesheet' and an 'Add Entries' button. At the bottom, there is a 'Timesheet' table with the following data:

Employee	Date	Start	End	Break	Units	Wage Type	Rate Code	Cost Centre	S.
Hillary, Matthew Martin	10/05/2010	07:54	16:30	01:00	07:36	Ordinary	1	0 Employee Default	
Total Units:					07:36				

To approve/unapprove a whole Group's timesheets

- 1 From the **Group** dropdown list, select the **Group** whose timesheets you want to approve.
- 2 By clicking on the **Approve Group** button, the manager can approve all the timesheets shown in the list. By clicking on the **Unapprove Group** button, the manager can unapprove all the timesheets shown in the list.

To approve/unapprove an Employee's complete timesheet

- 1 For the **Employee** dropdown list, select the **Employee** whose timesheet you want to approve.
- 2 By clicking on the **Approve Emp** button, the manager can approve the timesheet for the selected employee. By clicking on the **Unapprove Emp** button, the manager can unapprove the timesheet for the selected employee.



Skills checklist

Tick the skills that you have learned in this unit.

Skills	<input checked="" type="checkbox"/>
Entering Timesheet information	<input type="checkbox"/>
Approving and Declining Timesheets	<input type="checkbox"/>