MYOB EXO Business

MyStaffInfo

-For employees

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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 Employees

EXO MyStaffInfo

Course duration: 1.0 hrs

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Trademarks

Edition: **2011.01**

Participants

This course is aimed at:

- Users of EXO MyStaffInfo.

Prerequisites

Basic PC experience is required.

Instructional method

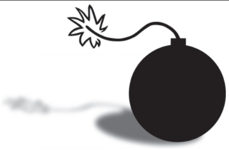
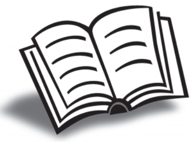
The instructional method combines trainer-led demonstrations with actual system configuration. Each unit concludes with a Review Task.

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 manuals

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:

- Access the MyStaffInfo website
- Posts News on the website
- Send and Receive Messages
- Update Contact Details
- View Leave Balances
- Request Leave
- View Payslips and other Payroll Reports
- Access the Company Locator Board
- Access the Company Phone List
- Enter Timesheet information

Contents

1 Introduction to MyStaffInfo

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 funcionality. 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***.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Access the MyStaffInfo Website	

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.

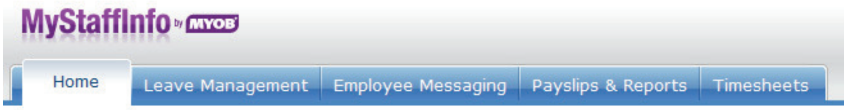
4 In the **Password** field, enter the user's password.

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.

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.

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.

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

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	✓
Log In on the EXO MyStaffInfo website	

MyStaffInfo - Home

3

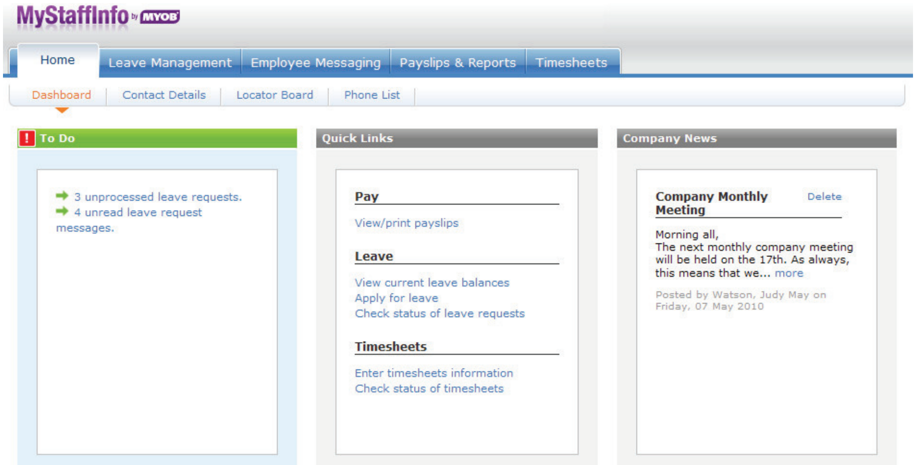
In this unit you will learn how to view and change contact details on the MyStaffInfo website.

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

- View/Change contact details
- Access the Locator Board
- Access the Phone List

Dashboard

This is the main page that will appear once you have loged in.



To Do

This section will show any items that requires action.

Quick Links

In this section the user can quickly access payslips, view their leave balances, apply for leave and enter timesheet information.

Company News

This section will display any company news posted on the MyStaffInfo website.

Company News/messages posted to all employees.

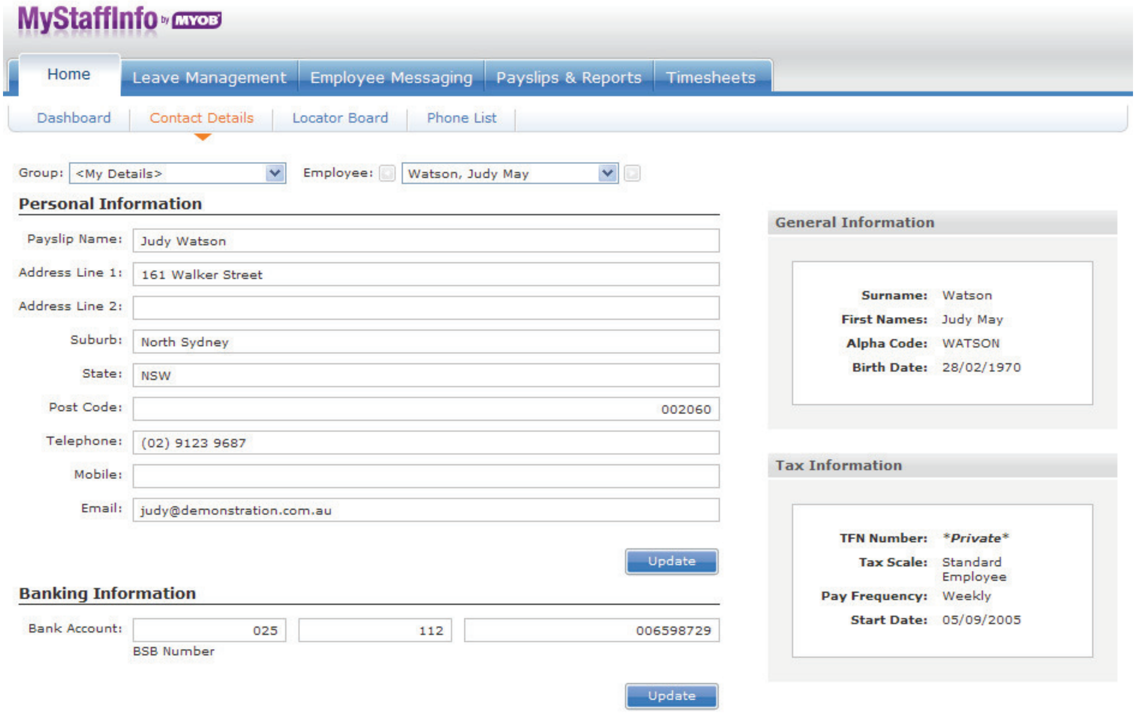
To access any of the items listed on this screen, click on the relevant hyperlink.

Contact Details

In the Contact Details section of the MyStaffInfo website, employees can update their contact details. When the website is sychronised with the payroll, these changes are downloaded to the payroll and the payroll is updated.

To access the Contact Details area

1 Under the **Home** tab, click on **Contact Details.**



The **Personal Information** shows the employee's Payslip Name and contact details.

IMPORTANT

The e-mail address is also the user's login code for the MyStaffInfo website. If it is changed, the user's old e-mail address will no longer be accepted as the valid login code.

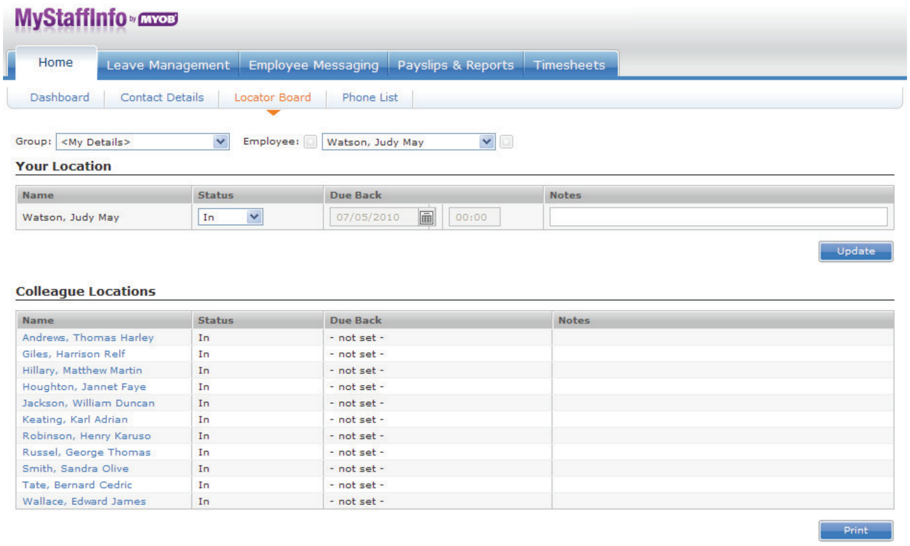
The **Banking Information** shows the bank account that the employee's pay will be paid into.

Click on the Update button once you've made any changes.

Locator Board

To access the Locator Board

1 Under the **Home** section, click on **Locator Board.**



To change your status

1 From the **Status** dropdown list, select the appropriate option.

2 If a **Due Back** is required, enter the ***Date*** and ***Time*** of your return.

3 In the **Notes** area, you can enter an optional note.

4 Click on the **Update** button.

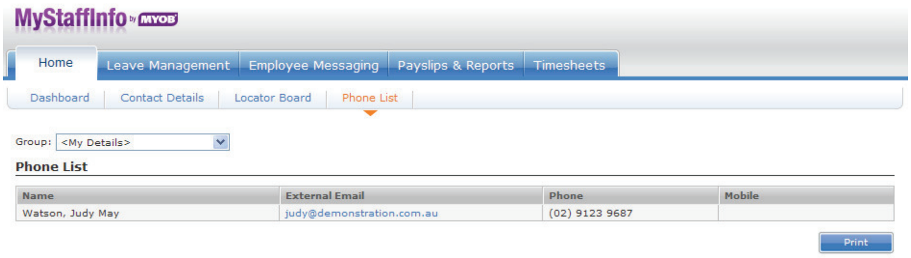
TIP

You can also print the Locator Board by clicking on the Print. The standard Windows Print screen will appear. Click on the Print button to print the Locator Board.

Phone List

To access the Phone List

1 Under the **Home** section, click on **Phone List.**



The Phone List shows the employee's e-mail address and phone number.

To send an e-mail to another employee

1 Click on the employee's e-mail address in the **External Email** field.

2 A new message will be created in your external e-mail application, e.g. Lotus Notes, Microsoft Outlook.

3 Complete and send your message as usual.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
View contact details	
Change contact details	
Update the Locator Board	
View the Phone List	

MyStaffInfo - Leave Management

4

In this unit you will learn how to view leave balances and request leave.

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

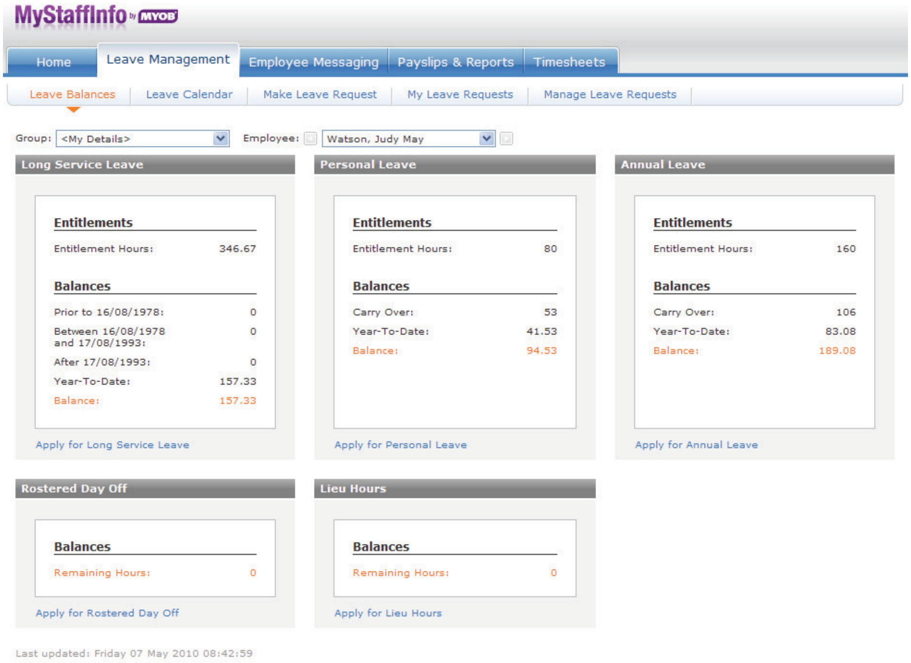
- View leave balances
- View the leave calendar
- Request leave

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

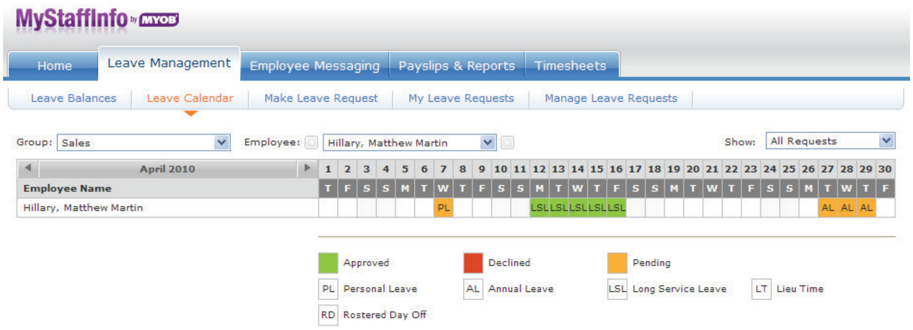
Users can also apply for leave under the *Make Leave Request* section.

Leave Calendar

The Leave Calendar lets the employee view all their leave requests in calendar format.

To access the Leave Calendar

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

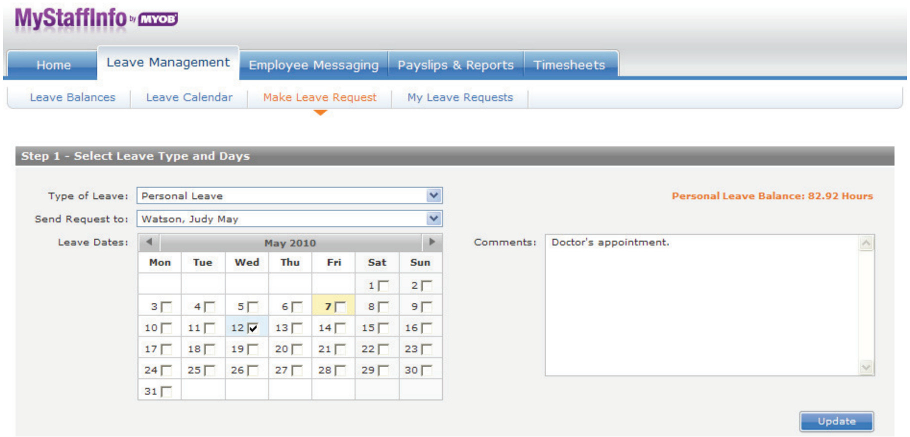


Make Leave Request

One of the key features of MyStaffInfo is that employees can apply for leave electronically.

To access the Make Request Leave section

1 Under the **Leave Management** section, click on **Make Request Leave.**



To complete a Leave Request

1 From the **Type of Leave** dropdown list, select the ***Type*** of leave you are requesting.

NOTE

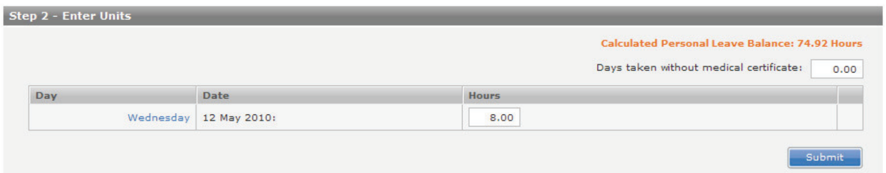
Only leave types to which the user has been given access will be available in the dropdown list.

2 From the **Send Request To** dropdown list, select the ***Manager*** that will approve/decline the request.

3 In the **Calendar**, select the ***Leave Dates*** the leave request is for.

4 In the **Comments** section you can enter additional information about this leave request.

5 Click on Update button.

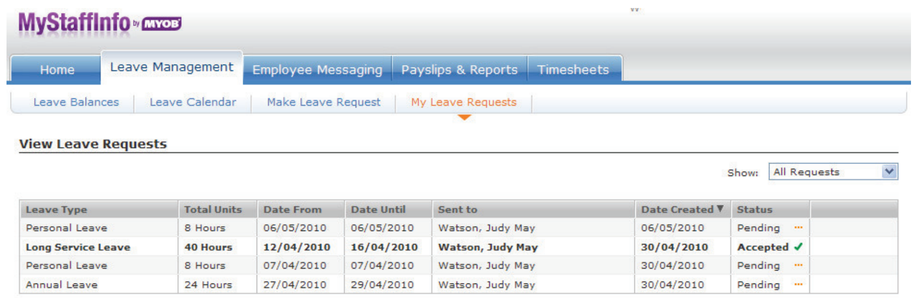


6 For each ***Date***, enter the number of hours of leave requested.

7 Click on the Submit button.

My Leave Requests

This area shows all the leave requests that the employee has made.



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 view the details of a leave request:

1. Click on the line for the leave request.

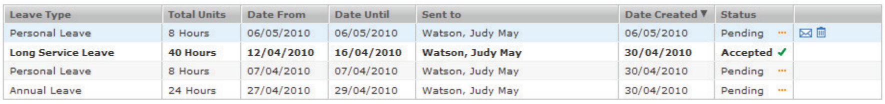
To delete a leave request:

1. Move your mouse over the leave request you wish to delete.

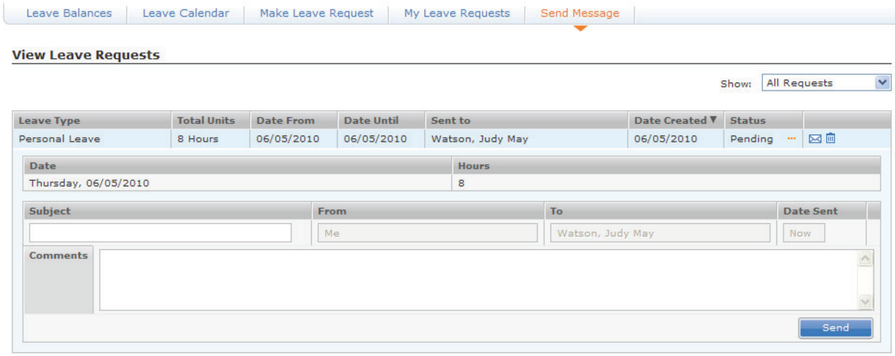
2. Click on the icon. A message will appear to confirm that you wish to delete this leave request. Click **Yes** to delete the leave request.

To send a message regarding a leave request:

1. Move your mouse over the leave request you wish to send a message about.



2. Click on the icon.



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

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
View leave balances	
View the Leave Calendar	
Make a Leave Request	

MyStaffInfo - Messages

5

In this unit you will learn how to send and receive messages using MyStaffInfo's message functionality.

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

- Post News
- Send a New Message
- Read a New Message

Overview

The Messages area on the MyStaffInfo website provides a way for employees to communicate with each other without the need for an e-mail program to be installed on their PC.

The messages are contained within MyStaffInfo, making them secure for employees to use.

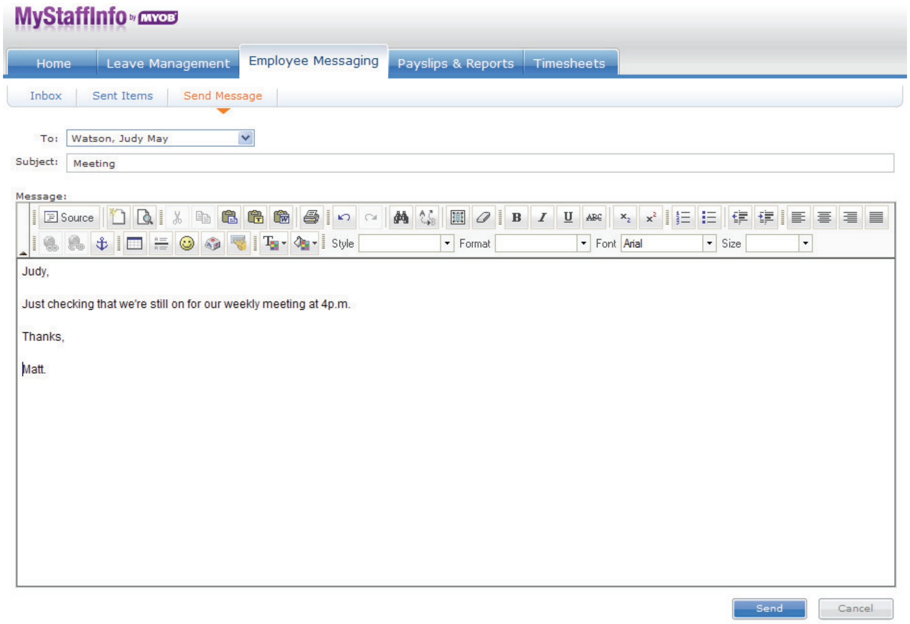
It functions similar to other web-based e-mail services.

To access the Messages area

1 Click on the **Employee Messaging** tab**.**

Send Message

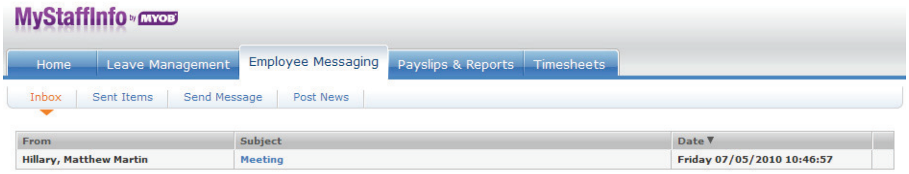
In this area you can send a message to a specific employee.



1. From the **To** dropdown list, select the employee you want to sent the message to.
2. In the **Subject** field, enter the subject of the message.
3. In the space provided, enter the ***contents*** of the message.
4. Use the various functions available from the toolbars to format the contents of the message.
5. Click on the **Send** button to send the message.

Inbox

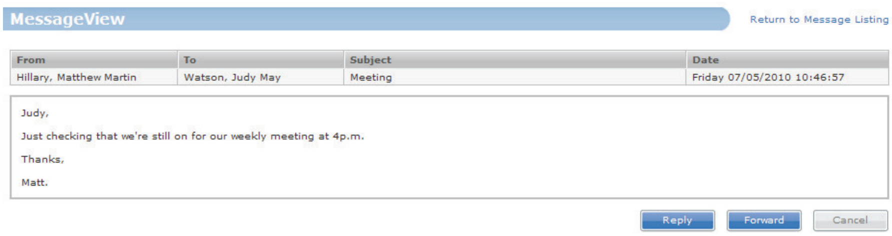
This area shows all the message that you have received from other employees.



To read a message

1 Click on the message you want to read.

2 The contents of the message will be displayed.



To reply to a message

1 Click on the **Reply** button.

2 In the space provided, enter the ***contents*** of the message.

3 Use the various functions available from the toolbars to format the contents of the message.

4 Click on the **Send** button.

To forward a message

1 Click on the **Forward** button.

2 From the **To** dropdown list, select the employee you want to sent the message to.

3 In the **Subject** field, enter the subject of the message.

4 In the space provided, enter the ***contents*** of the message.

5 Use the various functions available from the toolbars to format the contents of the message.

6 Click on the **Send** button.

To delete a message

1. Move your mouse over the message you wish to delete.
2. Click on the 🗑 button.

Sent Items

This area lists all the messages that the employee has sent.

To	Subject	Date ▼
Hillary, Matthew Martin	RE: Meeting	Friday 07/05/2010 11:12:39
All (News Item)	Company Monthly Meeting	Friday 07/05/2010 08:00:25

To view a sent message

1 Click on the message.

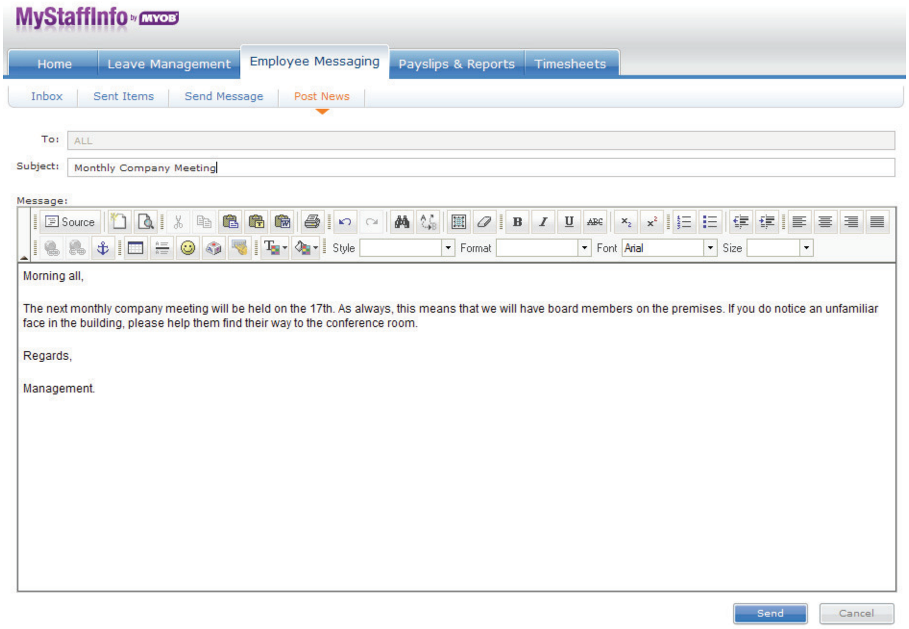
2 The contents of the message will be displayed.

To delete a message

1 Click on the  button.

Post News

In this area you can create a message to send to all your employees.



1 In the **Subject** field, enter the subject for the news.

2 In the space provided, enter the ***contents*** of the message.

3 Use the various functions available from the toolbars to format the contents of the message.

4 Click on the **Send** button.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Send a new message	
Read messages	
Reply to a message	
Forward a message	
Post news items	

MyStaffInfo - Payslips & Reporting

6

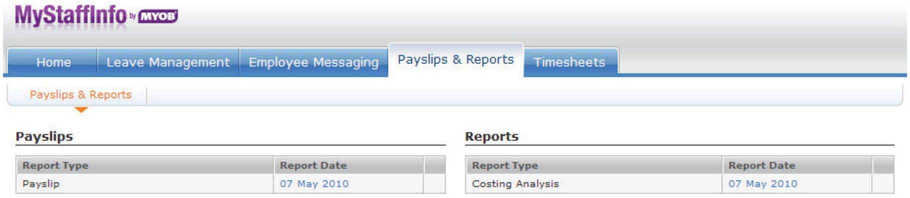
In this unit you will learn how to view paylips and reports.

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

- View paylips
- View reports

Overview

MyStaffInfo users can access their individual payslips as well as any EXO Payroll report uploaded for them to the MyStaffInfo website.



Payslips

Employees can view their payslips from this area on the MyStaffInfo website.

To access a payslip

1. Click on the payslip you want to open.
2. Adobe Reader will be launched.
3. A screen will appear, prompting you to enter your password. This is the same password used to log in to the MyStaffInfo website. Enter the password and click **Ok**.
4. The payslip will be displayed.

To delete a payslip

1. Click on the button next to the corresponding payslip you want to delete from the MyStaffInfo website.
2. A message will appear, confirming that you want to delete this payslip. Click on **Ok**.

Reports

Employees can view other payroll reports from this area on the MyStaffInfo website.

To access a report

1 Click on the date of the report you want to open.

2 The report will be displayed in a new window.

To delete a report

1 Click on the button next to the corresponding report you want to delete from the MyStaffInfo website.

2 A message will appear, confirming that you want to delete this report. Click on **Ok**.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
View Payslips	
View Payroll Reports	

MyStaffInfo - Timesheets

7

In this unit you will learn how to enter timesheet information

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

- Enter Timesheet information

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

Entering Time

In this area employees would enter their timesheet.

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:

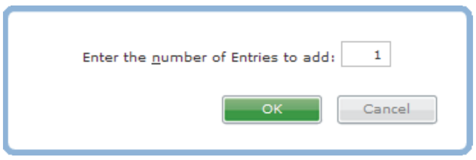
All	Show all timesheet entries
Approved	Only show timesheet entries that have been approved.
Unapproved	Only show timesheet entries that are unapproved.

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

To enter Timesheets

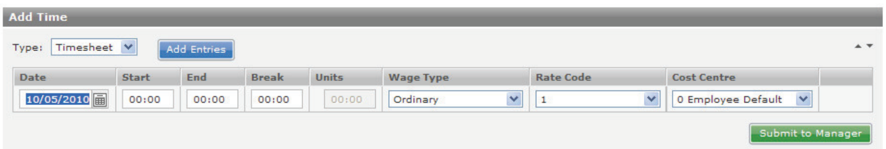
1 Select ***Timesheet*** from the **Type** dropdown list and click on the Add Entries button.

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 **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.

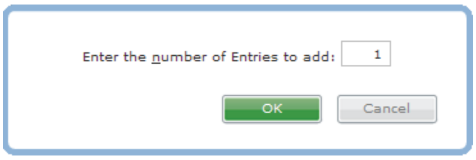
12 Click on the  button to add this record.

13 The entry will move to the **Timesheet** section.

To enter Wages

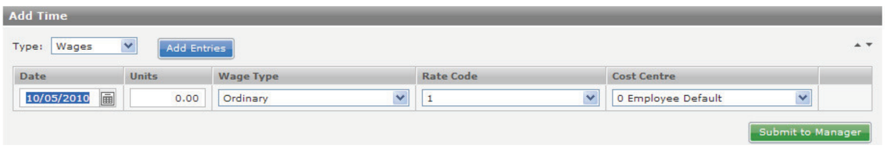
1 Select ***Wages*** from the **Type** dropdown list and click on the  button.

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 ***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.

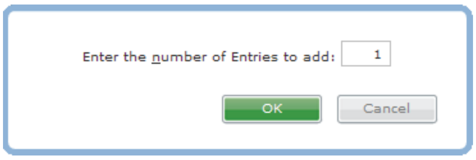
10 Click on the  button to add this record.

11 The entry will move to the **Wages** section.

To enter Leave

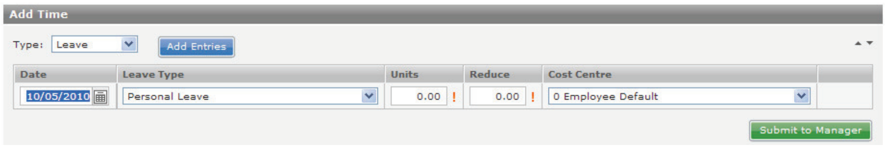
1 Select ***Leave*** from the **Type** dropdown list and click on the Add Entries button.

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.

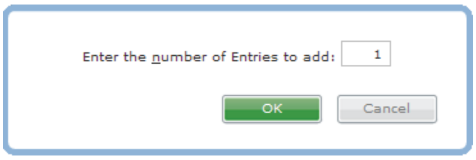
10 Click on the Submit to Manager button to add this record.

11 The entry will move to the **Leave** section.

To enter Allowances

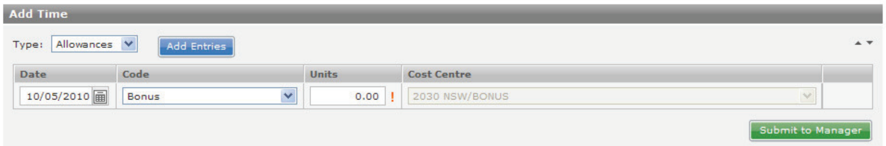
1 Select ***Allowances*** from the **Type** dropdown list and click on the Add Entries button.

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 **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 Submit to Manager button to add this record.

9 The entry will move to the **Allowances** section.

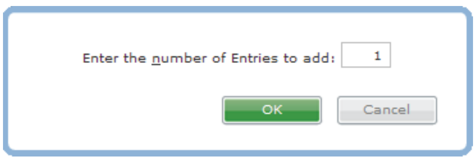
Hours Paid for Part-Timers (New Zealand version only)

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

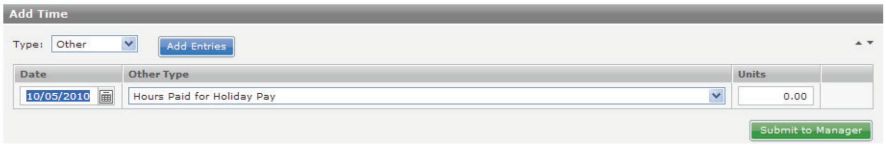
1 Select ***Other*** from the **Type** dropdown list and click on the Add Entries button.

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 

button to add this record.

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

TIP

You can print the timesheets by clicking on the 

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

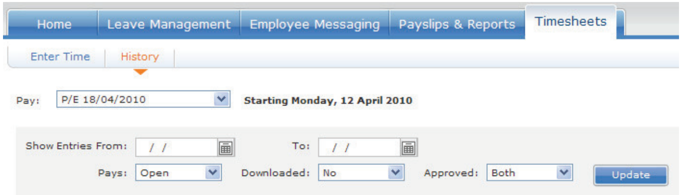
1. Move your mouse of the transaction you wish to delete.
2. Click on the icon.
3. A message will appear to confirm that you wish to delete this leave request. Click **Yes** to delete the leave request.

History

Employees 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  button.

8 All the timesheets entries that meet the above criteria will be displayed.

Skills checklist

Tick the skills that you have learned in this unit.

Skills	✓
Entering Timesheet information	