

PRONTO xi

Applications Overview



Payroll & Resources

Maximise the potential of your assets



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They are subject to changes and may be available in a Pronto Xi 770 service pack or future release of Pronto Xi.

All diagrams, drawings, product screenshots and any other types of visualisations in this document, use demo or synthetic data created for display purposes only.

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Maximise the potential of your team and resources

Ensure your everyday human and equipment processes are **manageable and easy to access**

Payroll and Resource Management puts information about the company's most valuable assets in front of decision makers, helping them to effectively respond to changing priorities. Get a complete view of your workforce and equipment, wherever they are located, in one secure system.

Unlock your resources' full potential – without overbooking them – with Resource Scheduler. See your team's workload and resource allocation in real time to easily find required availability.

Keep your people happy with a seamless remuneration process. Payroll is an efficient payroll system that helps you reward your employees for their hard work and effort.

Reduce the administrative burden by enabling management to effectively access important information anywhere, anytime via any mobile device.

Payroll

Designed specifically for Australian organisations, Payroll makes it easy to **manage** employee wages, entitlements, payments and accruals



Role
Control

Pronto Xi's fully integrated Payroll module gives you complete control over employee pay requirements, as well as the flexibility needed to manage multiple pay frequencies.

Payroll provides the capability to create numerous allowances and deductions, along with leave types, lump-sum payments and salary sacrifice deductions. Overtime payments and shift penalties are easily handled by multiplying the normal pay rate using a scaling factor.

The hours worked by an employee can be defined as a permanent transaction, entered on an ad hoc basis each pay run, or recorded using timesheets. A range of different payment frequencies – from weekly to monthly – can be paid in together or in separate pay runs.

Payroll calculates and deducts the income tax from each employee's pay according to a tax rate table, which can be updated if tax laws change. There is also provision for before-tax and after-tax additions and deductions, as well as tax adjustments.

There is a high degree of flexibility in defining leave conditions. You can differentiate between accrued and entitled leave, and set different accrual rates before and after a prescribed qualifying period. Personal leave, annual leave, long service leave and rostered days off are automatically accrued according to awards or individual requirements.

Leave requests can be pre-entered. Transactions representing leave taken, leave loading or payments in lieu of leave can then be processed in any pay run.

You can maintain separate General Ledger accounts for salary and wages, leave payments, and provisions for leave and employer obligations. These are automatically posted to the General Ledger.



Employee details

A wide range of employee details can be entered in Payroll, helping to make your company's payroll as automatic as possible. These include:

- full remuneration details, including information about tax rebates and allowances, tax declarations, Medicare exemptions and any government debt (e.g. STSL obligations)
- superannuation details, including employer and employee payments, and payments for multiple funds (as either a percentage or fixed value)
- leave details, including any special entitlements
- banking details, including the ability to make payments to multiple banks, and to pay a percentage or fixed value in cash

Payroll processing

To simplify processing, you can register permanent transactions to be made for an employee. These include:

- normal hours
- deductions
- allowances
- garnishee debts
- child support
- superannuation contributions
- advance loans

You can also set the tax deduction to a certain percentage if the employee has an income tax variation.

When Payroll is linked with Resource Management, the award system can automate the correct pay rates and allowances based on timesheet hours entered.

Year-to-date (YTD) transactions for each employee can be viewed in Payroll, with a drill-down to full details of each pay run.

Pay run workflow

The steps to prepare and perform a pay run are simple and logical.

Start pay run

This operation clears the previous pay run and allows you to set the pay run posting date.

Select employees for the pay run

Payroll includes permanent pay transactions for employees selected in the pay run.

Employees whose next pay date is after the date being processed will not be included in the pay run. Employees whose pay has been stopped for the current pay period (such as employees on leave without pay or suspended) will also not be included.

Enter timesheets

You can add, modify or delete timesheets while processing the pay run.

Payroll can generate the payment transaction for the employee for the period using:

- permanent transactions
- timesheet hours

Back payments can be easily configured and calculated for all your employees, while payouts can be configured to be made automatically on expiry or on termination.

Whether your employees are receiving a pay increase, bonus or commission, Payroll accurately assesses tax figures for businesses of any size, saving hours of manual work for your payroll teams. With no double-handling of data or Excel-enabled calculations, you can mitigate costly payroll mistakes.

Payroll allows you to accurately compensate employees on leave for extra hours worked. By maintaining this information in Pronto Xi instead of an Excel spreadsheet, your employee leave records remain up-to-date at all times. It allows you to work with your employees to efficiently plan leave, without the necessary information being fragmented across different systems.

Information can be fed through employee timesheets to ensure that data is traceable and accurate – ultimately saving you time and effort in managing employee leave.

Calculate earnings for the pay run

Based on permanent transactions and timesheet entries, Payroll will calculate the PAYG tax to be deducted, as well as determining any allowances and deductions, to arrive at the net value to be paid to each employee in the pay run.

Four reports will be produced:

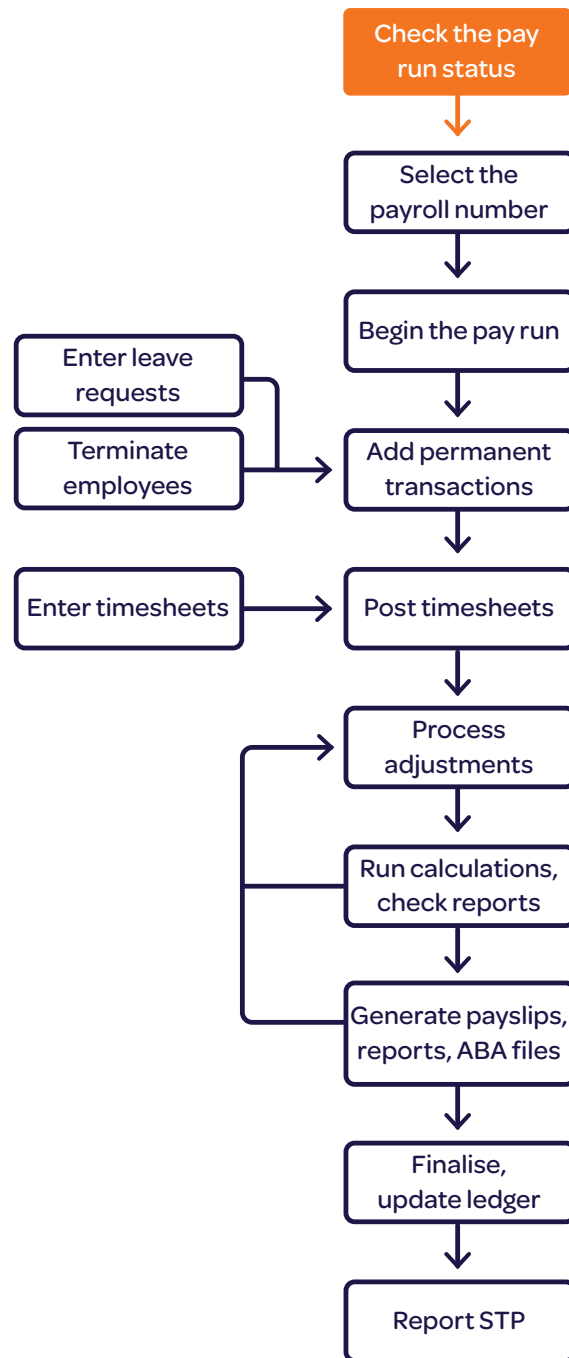
- Errors and warnings relating to the pay run. If there are errors, the pay run is suspended until they are corrected. Discrepancy warnings (for example, a person who has taken more leave than their entitlement permits) do not stop the pay run.
- Full details of the amounts being paid to each employee in the pay run, including tax and other deductions.
- Employee summary that displays leave accruals, gross and net tax, and all other allowances and deductions.
- Comparison of each employee's current pay and previous pays, showing any variances.

Print payslips and other advice

This function exports a file to order electronic transfers of funds from the company bank account to employees' accounts.

It also creates the employee's payslip, with details of all amounts paid and deducted. Leave accrued, used and outstanding – such as annual leave, personal/carer's leave, rostered days off (RDOs), and other forms of leave recognised by your organisation – can be included.

The General Ledger Postings Report is also created at this point, displaying the full General Ledger details that will be posted.



Perform a pay run using Payroll's workflow



Update employees

As the final step in the pay run, Pronto Xi updates Payroll and General Ledger. In particular, Pronto Xi will:

- update the employee's earnings history
- write the payment transactions to the employee
- update the employee's entitlements for any leave accrued, entitled or taken
- update the YTD history by pay code
- update the General Ledger accounts that are affected by Payroll processing

If needed, there is also the option to restore the previous pay run.

Single Touch Payroll Phase 2

Pronto Xi is compliant with Single Touch Payroll (STP) Phase 2, enabling businesses to complete seamless reporting to the Australian Taxation Office (ATO).

Payroll's STP reporting solution allows you to report payments such as salaries and wages, pay as you go (PAYG) withholding and superannuation to the ATO.

To submit STP data to the ATO and retrieve ATO responses, Payroll uses a third-party gateway that provides messaging services. This is directly integrated with Payroll via APIs.

Fringe benefits tax

Payroll allows for the entry of an employee's "grossed-up" annual reportable fringe benefit tax (FBT) amount.

This amount should be entered prior to processing end-of-year finalisation for STP, which must include the reportable FBT.

End of year

At the end of the financial year, STP finalisations can be generated for:

- one or more employees
- all employees
- individual ABNs
- different locations
- current employees
- terminated employees

Payroll prepares for the start of a new financial year by:

- clearing the previous year totals from employee and pay code records
- setting the new payroll financial year.
- This process is done before the first pay run in the new financial year

Reports

Business Intelligence with IBM™ Cognos™ Analytics* provides an extensive range of reports and report-authoring solutions to meet your organisation's payroll information needs.

Reports available in Payroll include:

- Earnings by Pay Code
- Leave Liability
- Payroll Tax
- Superannuation Remittance Advice
- Superannuation History

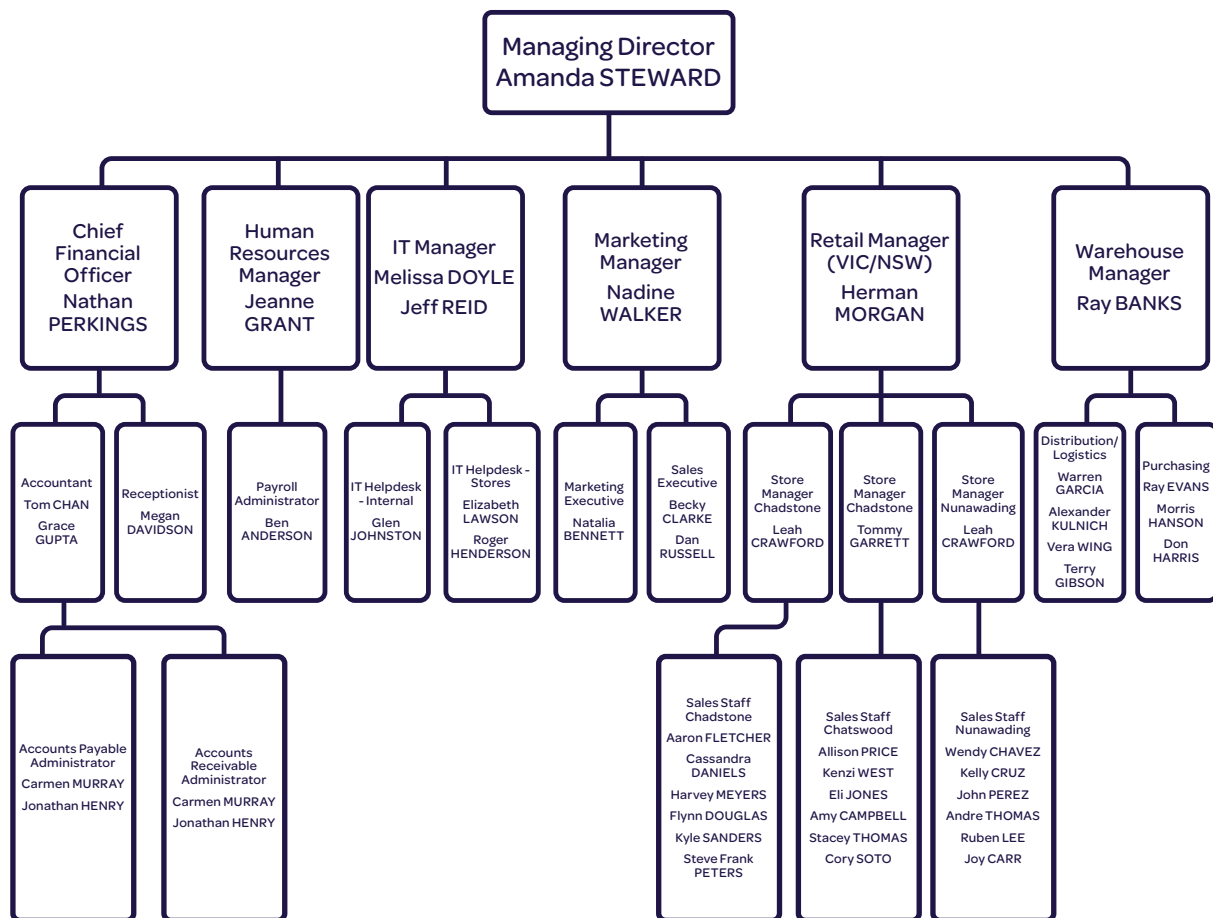
Human Resource Management

Behind every product or service, there is human thinking, effort and time. Human Resource Management (HRM) **makes it easy to manage your people**

Your organisation's most valuable asset

HRM allows you to control the detailed information necessary to meet your organisation's personnel management requirements. HRM is fully integrated with Payroll and includes the following features:

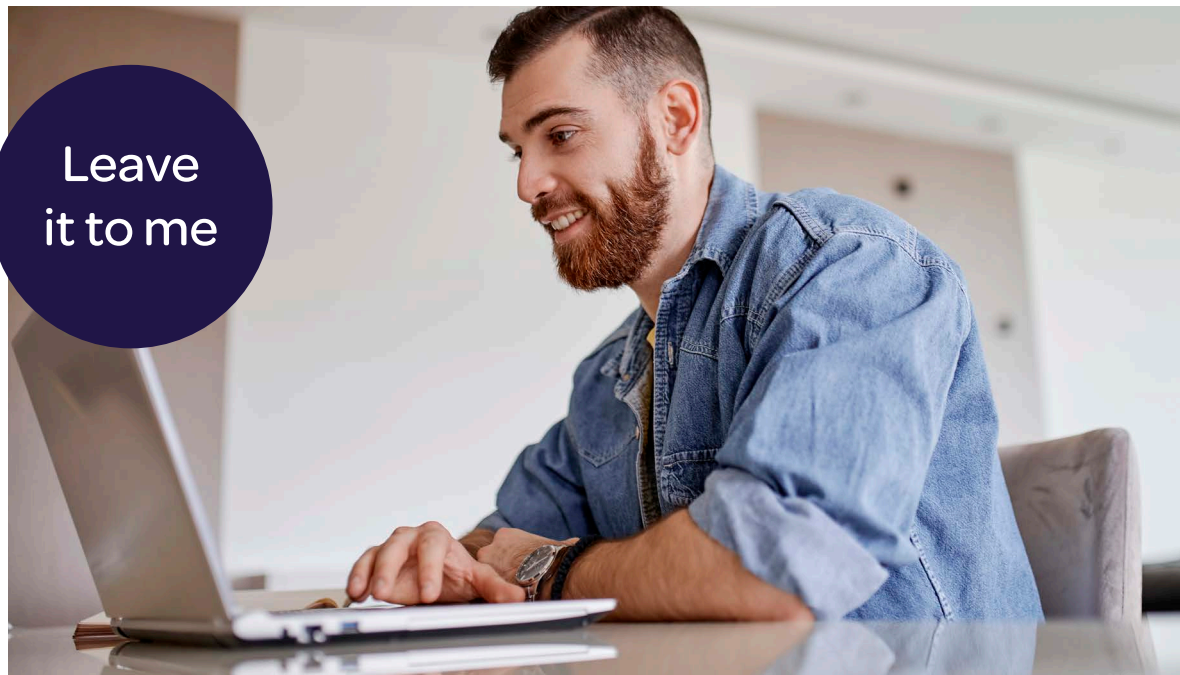
- a user-definable organisation structure
- internal and external training records
- position vacancy tracking
- employee position and salary summary
- easy-to-maintain leave administration
- human resource planning
- ability to review all applicant details for each vacancy
- statistical analysis of all employment categories



Set your organisation structure in Human Resource Management

Employee Portal

Increase your employees' and managers' satisfaction and **efficiency by empowering them with Employee Portal**



Managing human resources can place a large administrative burden on many companies. By reducing paper-based processes and streamlining tasks, Pronto Xi helps to reduce this burden.

Built as a fully responsive web application, Employee Portal gives managers direct access to employee-related information, while employees can quickly perform day-to-day tasks using a PC, tablet or smartphone.

Wherever your staff are, they can:

- enter timesheets and allowances
- view and update personal details such as address, emergency contacts and banking information
- submit leave requests and attach digital paperwork such as medical certificates
- view and print payslips
- track submitted leave requests and timesheets
- estimate future leave balances
- accept or decline rosters.
- Managers have access to extended capabilities, including:
 - manage their to-do list, such as submitted leave requests
 - see who is on leave
 - manage timesheet approvals.
- Pronto Xi's time translation functionality also helps to streamline timesheet processes, allowing you to automatically assign allowances

User administration

Tightly integrated with Payroll, the Employee Portal uses the organisation chart to ensure managers can only view information for staff within their reporting structure.

Administrators can determine the functionality available to Employee Portal users, ensuring alignment with your organisation's existing policies and processes. This control can even be set at the individual employee level – for example, an administrator can selectively determine which employees can view personal/carer's leave entitlements.

Administrators can also customise the portal colour scheme and apply their company logo.

Where access is granted, end users can personalise their home page and other view settings, giving them quick access to their own key tasks and information. They can accept or decline rosters directly from an email or from within the portal and can quickly complete weekly timesheets by cloning previous timesheets.

Managers can also approve or decline leave requests via email. Data in Pronto Xi's Project and Resource Management modules is then updated accordingly in real time.

The screenshot displays the PRONTO Xi Employee Portal interface. The top navigation bar includes the company name, a search bar, and user information. The main content area is divided into several sections:

- My personal details:** Shows a profile for Frank Jones, Senior Manager.
- My team:** Lists team members, including Amy Miller.
- My emergency contact details:** Lists contacts like Mary Jones (Spouse) and Barry Harvey (Friend).
- My to do list:** Shows a task to 'Approve leave request' for Personal Carers Leave for Amy Miller on 14-JUN-2022.
- Who's on leave:** A section for viewing leave requests, currently showing 'No employee has leave for this date range'.
- My leave balances (hours):** A table showing entitlements for various leave types.
- Review/approve my team's timesheets:** A section for reviewing and approving team members' timesheets for the week ending Sunday 24/07/2022.
- My resource timesheets:** A section for viewing and approving personal resource timesheets for the same week.

Leave type	Entitled	Taken	Owed
Annual	545.56	23.45	522.11
Personal/ Carers	14.56	0.00	14.56
Long service	0.00	0.00	0.00
Rostered	0.00	0.00	0.00
Time In Lieu	0.00	0.00	0.00

Date	Normal hours	OT hours	Entries
Mon 18/07/2022	0.00	0.00	0
Tue 19/07/2022	0.00	0.00	0
Wed 20/07/2022	0.00	0.00	0
Thu 21/07/2022	0.00	0.00	0
Fri 22/07/2022	0.00	0.00	0
Sat 23/07/2022	0.00	0.00	0
Sun 24/07/2022	0.00	0.00	0

Maintain information about your employees

Resource Management

Plan and manage both human and non-human (asset) resource requirements in a single module with Resource Management

Make
the most
of your
resources

Resource Management provides functionality relating to employees, subcontractors, fixed assets and serialised equipment. It includes:

- time-based timesheets
- time interpretation
- define work cycles
- define resource attributes templates
- rostering

In addition, Resource Management includes features and functionality that is can only be used for employees that are linked to a resource.

Link resource master records to employees, engineers, suppliers, assets or serial items to manage resources within the module's centralised Resource Schedule view. Identify over- or under-utilisation of resources with ease, and use the screen to reallocate resources as needed.

People, equipment and resources are often allocated together on service calls, plant work orders or project tasks. Resource Management allows you to predefine these teams for faster allocation.

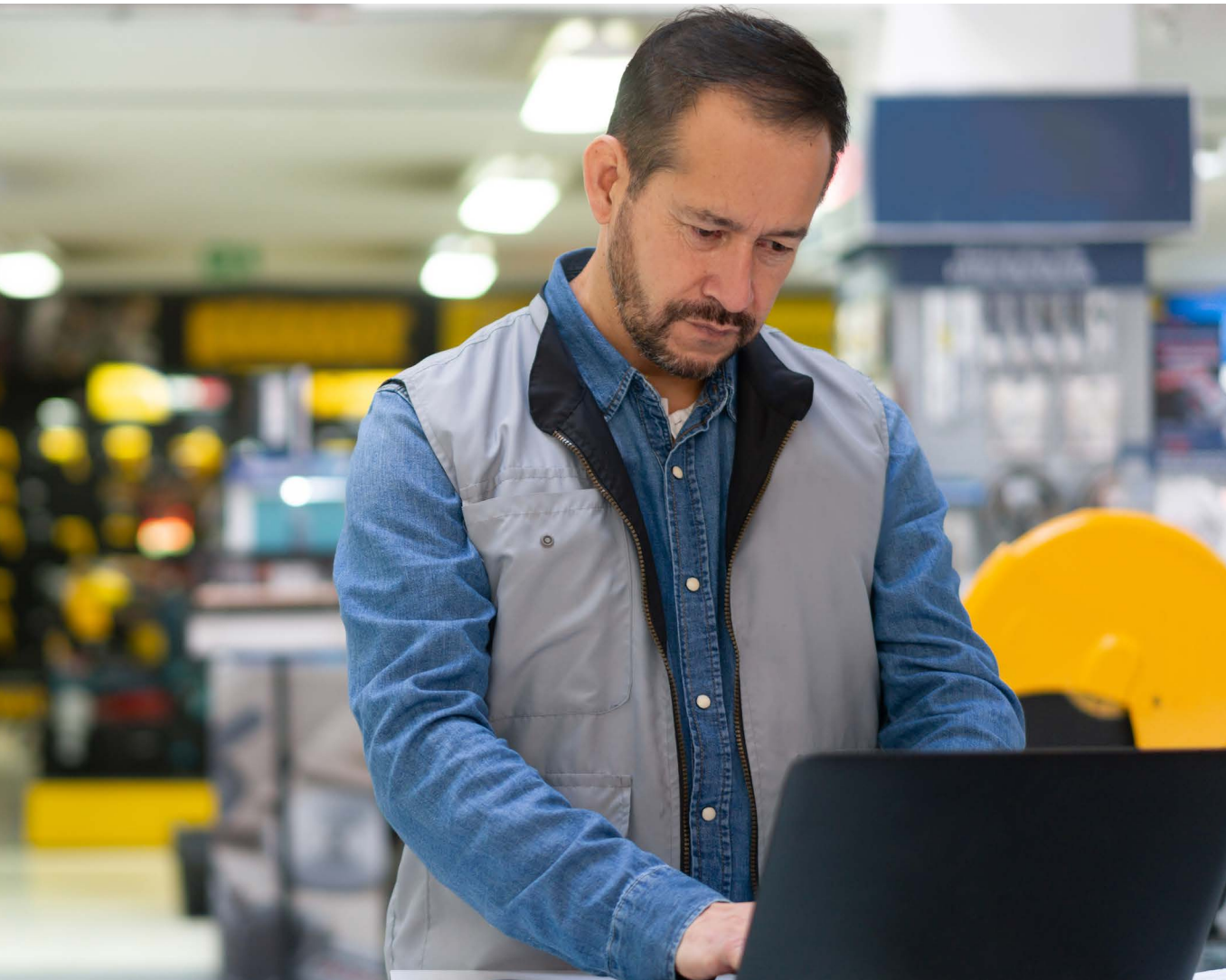
Benefit from more efficient work allocation to project tasks or service calls with user-defined resource attributes, such as skill codes or position details. Use attribute filters to isolate the most appropriate resource for the job, or create quick filters – which are based on predefined attributes – to easily to schedule multiple resource types with different skill sets.

Project managers and schedulers are often required to plan projects and forecast workloads in advance. To prevent any scheduling issues, Resource Management includes generic resources for planning purposes. These can be replaced with actual resources when the project is approved and dates are confirmed.

Rosters, awards and timesheets

Underpinning Resource Management is a comprehensive work roster and employee award system.

Set up work cycles so you know when people are available and expected to work. Resource Management allows you to determine which employees have the right qualifications or competencies, and to identify the physical locations where they are available to work.



Rosters can then be created to make sure your operations are fully resourced by the right people at the right time.

Budgets can be set for each roster and compared to actual rostered costs to ensure you have full visibility and control.

Timesheets can be entered using total hours or start/stop times. Awards are automatically applied to timesheets, with normal and overtime hours apportioned in accordance with the award definition. Award-specific allowances are also taken into account.

The timesheets are then translated using Pronto Xi's integrated awards interpreter, ensuring your employees receive the correct pay. Awards in Pronto Xi are user-defined and flexible enough to handle the most demanding employment conditions.

Managers can gain efficiencies by allocating resources quickly using auto-populating timesheets for an entire team, and by moving resources in and out of teams with an audit trail.

Subcontractors can accept or decline work orders, projects tasks or rosters via email without logging onto Pronto Xi. This means that subcontractors do not need to be set up or trained as Pronto Xi users, simplifying the workflow, reducing costs and making it easier to onboard a new resource.

You can also define subcontractor attributes such as insurance requirements, which can leverage Pronto Xi's integration to trigger warnings or stops within the system if the insurance expires.

Resource Scheduler

Quickly allocate resources with Resource Scheduler, **maximising your efficiency**

Finding my best resource

Resource Scheduler is an intuitive single-system web application that enables you to efficiently allocate and reschedule resources, teams and equipment, reducing hours of manual work and eliminating disparate systems.

Manage the entire resource management life cycle in Pronto Xi with the Resource Scheduler. You can plan your resource, team or equipment allocations with full visibility across Pronto Xi's Service, Project, Maintenance Management and Resource Management modules.

This enables your projects to meet deadlines, stay on budget, and ensure minimum strain is placed on employees and resources.

You will also be able to allocate the most appropriate service engineers – as well as required equipment – to carry out service work. This functionality is equally applicable to fulfilling maintenance work order requirements.

Once the Resource Scheduler is in use, planning will be based on historical data and adjusted to anticipate bottlenecks and low activity periods, eliminating guesswork.

Whether you are resourcing task-based engagements, rosters or specialised services, the Resource Scheduler is a versatile planner that lets you estimate and plan resource allocation visually. Quickly narrow down the available resources with a variety of filters.

With Pronto Xi's Google Maps integration, you know where your resources are and can route them based on their proximity to call locations.

Unpredictable resource needs are a constant in service organisations. By having a real-time view of your current resource allocations, unplanned situations become an opportunity to delight customers. It means you can focus on serving real customer needs – rather than putting out fires.

User access

Scheduler users can be defined as either enquiry users or maintenance users.

Maintenance users can perform duties on the scheduler based on their specific user access.

Enquiry users can only see what is displayed on the scheduler based on the roles assigned.

View types

The Resource Scheduler is divided into two sections on the one screen – Unallocated Activities and Resource availability.

Different types of views include:

Planner view

Planner view displays all unallocated activities across the modules and resources that the user has access to. It can be toggled to be a dedicated view of unallocated events (which are activities that are yet to be allocated to a resource) based on the module under review. The views are:

- Unallocated Events – Project Tasks
- Unallocated Events – Maintenance Work Orders
- Unallocated Events – Service Calls

Team colour coding gives the user the ability to easily see the utilisation of different teams, while a timescale toggle allows users to quickly move between the day, week and month view on both the Unallocated and resource availability screen sections.



Map view

Using web-based map technology, Pronto Xi helps users to quickly access a map or driving directions for their next service call by clicking the relevant map link on the screen.

Service managers can stay up-to-date with the location of each member of the service team and allocate calls based on real-time information including traffic, route and location.

Service call map view

Service managers can locate the nearest available team members based on the service call address. With all the relevant resource information (including workload) readily available, it's easy to select a service team member and immediately allocate them to a call based on availability.

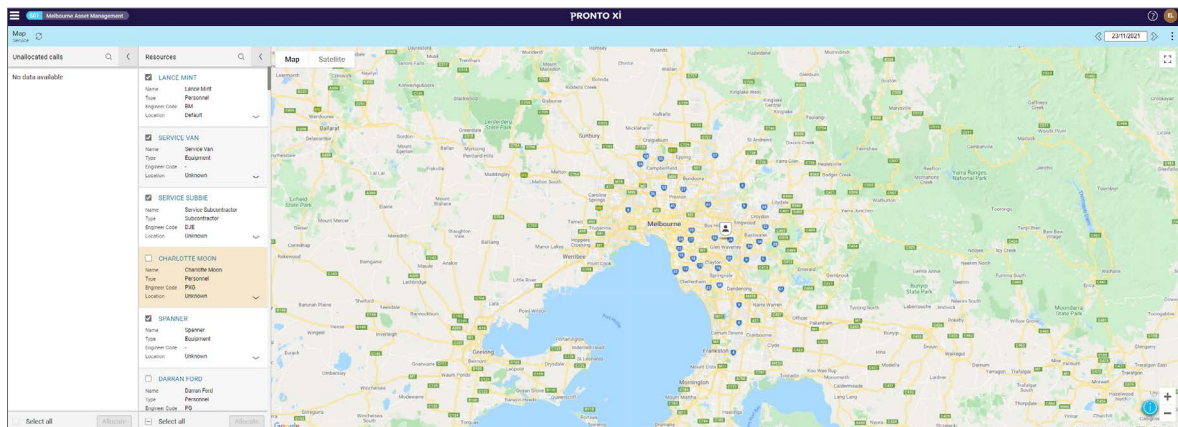
Best routes and location history

Service managers can review location history to further optimise resource allocation strategies and improve customer service response times.

By understanding the location of your field resources, you can build cost-saving efficiencies into your organisation's processes without compromising customer satisfaction or work health and safety obligations.

Scheduler view

Scheduler view offers auto-refresh capabilities. This refresh will be performed automatically, but can be configured to control the frequency of the refresh.



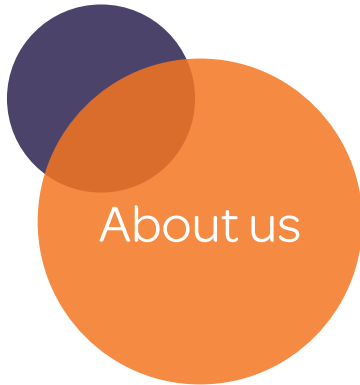
Optimise your planning with integrated Google Maps

The screenshot shows the 'Planner' view in Pronto Xi. It features a grid for 'Unallocated events' and 'Resources' over a period of time. The grid columns represent time slots from 11 AM to 7 PM on Tuesday, 08/06. The rows list customer events and individual resources with their respective codes and groups.

Unallocated events						08/06 11AM	08/06 12PM	08/06 01PM	08/06 02PM	08/06 03PM	08/06 04PM	08/06 05PM	08/06 06PM	08/06 07PM
CUSTOMER	PRIORITY	DESCRIPTION1	DESCRIPTION2	TYPE	OWNER									
AB Oxford Cold	Highest	E - Equipment		Fees	NSW									
Super-K Qld	Highest	E - Equipment		Fees	NSW			E - Equip						
Super-K Qld	Highest	E - Equipment		Fees	NSW									
Super-K Qld	Medium	E - Equipment		Fees	NSW						E - Equip			
Super-K Qld	Highest	E - Equipment		Fees	NSW									
Resources														
NAME	CODE	GROUP	ENGL.	PRO...	LOCATION CAL...									
Ben Riggs	CV	Engineer		SPAN	Melbourne									
Wendy Smith	LOB	Engineer	PG	DARR	Sydney									
Gary Keys	GC	Plumber	SC	SALLY	Perth									
Ray Hopkins	PBE	Ext Consult	JOB	JOB	Melbourne									
Kim Dunkin	RX	Engineer	BM	LANCE	Melbourne									
Margie Kim	CR	Plumber	JKH	JHOSK	Brisbane									

Take an hourly view of your unallocated events and resources





PRONTO SOFTWARE

We are an Australian developer of award winning business management and analytics solutions. Pronto Xi, our Enterprise Resource Planning (ERP) software, integrates accounting, operational and mobile features in a single system – optimising business processes and unlocking actionable insights. That's why for more than 40 years, over 1,500 Australian and global organisations, across a wide range of industries, have trusted Pronto Xi to simplify their most complex challenges.

With headquarters and our Development Centre located in Melbourne, we have support offices and consultants based across Australia, as well as a global network of Resellers and Solution Partners. Specialised business units within Pronto Software have the expertise to assist you with pivotal technology – Digital Transformation with Pronto Woven, Cloud and Hosting services with Pronto Cloud and Business Intelligence solutions with Pronto iQ.

When you choose Pronto Software, you gain a team with deep industry experience, giving us the ability to understand your specific needs and build innovative solutions that drive business growth and revenue.

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