PRONTO Xi

Applications Overview



Payroll & Resources

Maximise your most valuable assets

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Contents

Maximise the potential of your assets 4

Payroll 5
Payroll employee details 5
Organisation management 6
Leave management 6
Integrated timesheets 7
Pay run management 7
Compliance 9
Reports 9

Employee Portal 11
User administration 12

Resource Management 13
Resource master 13
Work cycles 14
Rosters 14
Time interpretation 14
Timesheets 14
Attributes 14
Notifications 14
Pronto Xi module integration 15

Resource Scheduler 17
View types 17

Maximise the potential of your assets

Efficiently manage resources activity and equipment processes with time-saving Payroll and Resources tools

Pronto Xi's Payroll and Resource Management gives you a complete view of your workforce and equipment, wherever they are located, in one secure system.

These modules put information about your most valuable assets in front of decision-makers, helping them respond to changing priorities effectively. In addition, they reduce the administrative burden by enabling management to effectively access important information anywhere, anytime via any mobile device.

Payroll helps keep your employees happy with a seamless remuneration process. The efficient payroll system assists you in rewarding your employees for their hard work and effort.

The Employee Portal equips managers and employees to quickly perform daily tasks, like submitting leave and updating details.

Resource Management enables you to plan and manage human and equipment resource requirements.

And, unlock your resources' full potential — without overbooking them — with Resource Scheduler, which gives you a real-time view of your team's workload, resource allocation and availability.

Payroll

Get comprehensive control over Australian employees' wages, entitlements and payments with Payroll

Pronto Xi's Payroll is a one-stop shop for managing your employees. It streamlines remuneration and payments and captures all employee information in one spot, enabling you to run your business more efficiently.

Payroll's key features and functionality enable you to:

- easily manage employee details, remuneration specifics, superannuation, banking information and permanent transactions
- meet personnel management requirements with Organisation Management's user-definable structure
- flexibly define leave conditions and estimate leave values with Leave Management
- link Resource Management to employee profiles for accurate leave entitlement calculations
- streamline employee time management and compliance with annualised salary requirements through Integrated Timesheets
- simplify pay run generation, reconciliation, confirmation and compliance with Single Touch Payroll Phase 2 using Pay Run Management's centralised workflow process



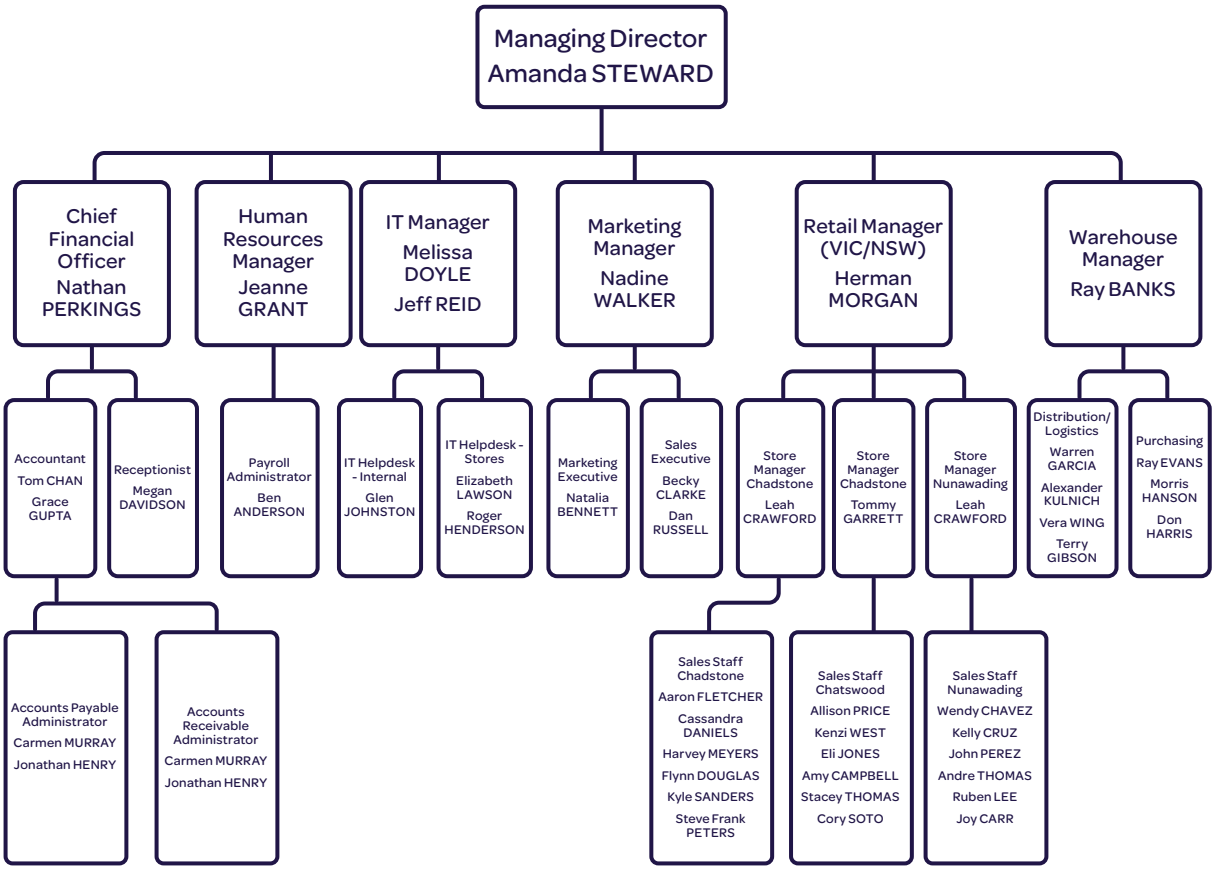
Payroll employee details

Input a variety of employee information into Payroll to streamline your company's payroll processes. Information can include:

- **Personal details** — Add personal details, set Wage Gender Equality (WGEA) reporting standards and create custom categories for analysing employee expenses and benefits
- **Remuneration** — Cover tax exemptions, thresholds claimed, Medicare exemptions and any governmental debts like STSL obligations
- **Superannuation** — Specify the employee's chosen fund and include salary sacrifice or extra superannuation contributions. Additionally, add reportable employee contributions
- **Banking information** — Define the employee's default banking preferences and up to six additional banking choices
- **Permanent transactions** — Establish recurring payments or automatically apply deductions in each pay cycle, such as salary sacrifice deductions, child support payments and union fees
- **Earnings history** — Get an overview and insight into all payments made to the employee categorised according to ATO STP reporting standards
- **Costing** — Categorise employees so that the general ledger accounts for salary and wages, as well as leave payments and provisions concerning employee obligations and leave. These entries are automatically reflected in the General Ledger system

Organisation management

Organisation management tools control the detailed information necessary to meet your organisation's personnel management requirements. The tools allow you to develop a user-definable organisation structure to assist with leave and timesheet approvals.



Set your organisation structure in Human Resource Management

Leave management

When it comes to defining leave conditions, Payroll is highly flexible. Distinguish between accrued and entitled leave, and establish varying accrual rates before and after a specified qualifying period. Personal leave, annual leave, long service leave and rostered days off accumulate automatically in alignment with awards or individual needs.

Payroll officers can use estimation tools to approximate leave values owed to employees. These tools offer information on owed, projected and accrued values up to the estimation date.

Enter leave requests in advance and they'll be added to the relevant pay cycle when payment is due. These leave transactions offset any permanent transactions, reducing double handling. You can manage subsequent transactions related to taken leave, leave loading, or payments in lieu of time off during any pay run.

Link Resource Management to an employee profile to create employee work cycle patterns. By defining the work cycle, you can specify what constitutes a working day, which is crucial when calculating leave entitlements as it helps determine the exact number of days or hours accrued through leave requests.

Integrated timesheets

The integrated payroll system seamlessly generates timesheets from various sections of Pronto Xi, automatically incorporating them into your employees' pay schedules. Timesheets can be user-defined to suit various needs, whether it's for costing and payroll purposes, costing alone, payroll alone, or entirely notional. This timesheet functionality empowers organisations to effectively manage employee time and uphold compliance with annualised salary requirements.

Connecting Resource Management to an employee profile enables you to establish work cycle patterns for your employees and associate them with time interpretation rules. This way, when timesheets are submitted for or by the employee, the interpretation engine categorises the total work time into different time buckets for regular and overtime components.

Pay run management

A central pay-run workflow process offers great flexibility in processing payroll. Initiating a pay run allows you to set up the specifics, such as defining whether it's a standard pay cycle (including all employees or only those due for payment), or an adjustment pay run. You can also temporarily pause leave and superannuation entitlements for that particular run.

Pay run generation

Payroll allows you to submit leave requests, track timesheets owed and process permanent transactions. It automates these tasks, streamlining your payroll officers' workload. After setting up the pay run, payroll officers can easily reconcile payments and input necessary details for each employee.

Whether employees are getting a raise, bonus or commission, Payroll precisely calculates tax amounts, saving your payroll team time on what would otherwise be spent on manual tasks. With no need to handle data multiple times or rely on Excel-based calculations, you can prevent costly errors in payroll processing.

Pay run reconciliation

Analysing pay transactions is simple. When a payroll officer examines an employee's pay run, they have immediate access to their current pay transactions, leave entitlements owed, generated timesheets and previous pay information. All necessary details are in one place, so payroll officers don't need to navigate multiple screens.

The payroll system computes the PAYG withheld and the superannuation guarantee owed to each employee to determine the net value paid for that particular pay run. It automatically produces detailed reports, enabling:

- the identification of errors and warnings related to the pay run
- a comprehensive breakdown of amounts paid to each employee in the pay run, including taxes and deductions
- the generation of an employee summary showcasing leave accruals, gross and net tax figures, and other allowances and deductions
- comparison between an employee's current and past payments highlighting any discrepancies



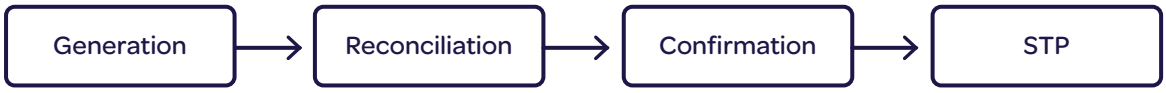
Pay run confirmation

Once the payroll is reconciled, a payroll officer confirms the payroll. This important step involves creating pay slips, banking information files and general ledger costing information.

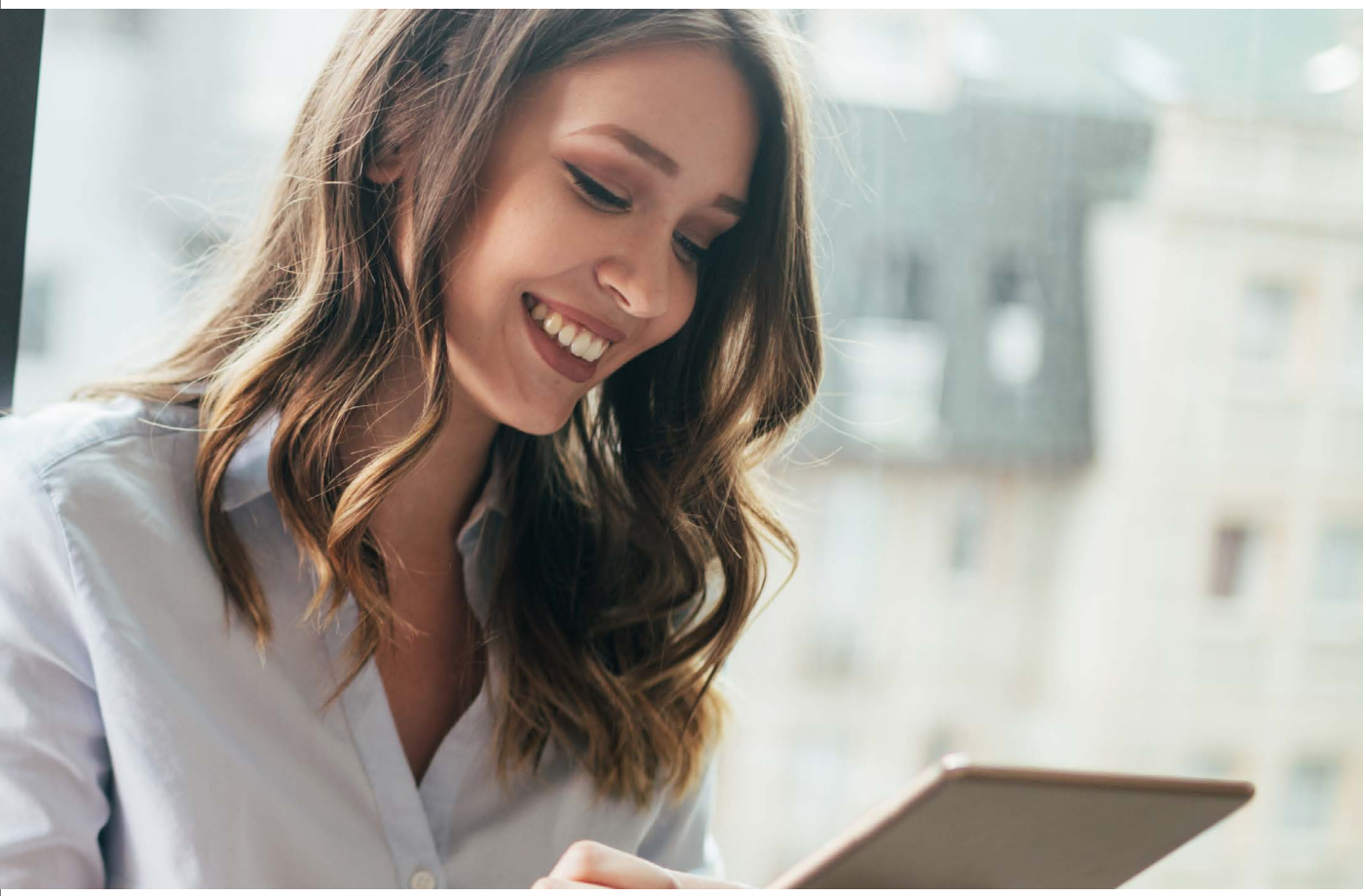
An employee's payslip provides a comprehensive breakdown of amounts paid and deducted. It also includes details on accrued, used and outstanding leave, including annual leave, personal and carer's leave, rostered days off (RDOs), and any other type of recognised leave within your organisation.

Upon verification by payroll officers, Pronto Xi updates the Payroll module and generates general ledger postings. Specifically, the system:

- updates the employee's earnings history
- records payment transactions for each employee
- adjusts employee entitlements related to accrued or taken leave
- updates year-to-date history on various pay codes
- updates general ledger accounts impacted by Payroll processing



Pay run workflow



Compliance

Single Touch Payroll Phase 2

Pronto Xi's Payroll complies with Single Touch Payroll (STP) Phase 2, which facilitates business reporting to the Australian Taxation Office (ATO). STP reporting feature allows you to report various payments like salaries, wages, pay-as-you-go (PAYG) withholding and superannuation contributions to the ATO. We safeguard and streamline all interactions with the ATO through our ATO communications gateway.

National Employment Standards (NES)

When it comes to managing leave and compliance, Payroll caters to the National Employment Standards (NES). Users can establish their own rules for leave entitlements, grant extra leave entitlements beyond NES requirements and adapt to various jurisdictions' regulations on long service leave.

The system also supports paid family domestic and parental leave programs within its leave management features.

Reportable fringe benefits & exempt foreign income

Payroll enables the input of an employee's reportable fringe benefits or exempt foreign income and reports this through STP.

Reports

Payroll offers a wide array of reports, such as PAYG reconciliation, STP summaries, end-of-year information, earnings by pay code, leave liability, payroll tax, and superannuation remittance advice and history. Cater reporting options to your organisation's specific payroll information requirements when you use Pronto Xi Payroll in conjunction with IBM™ Cognos™ Analytics*.

*IBM and Cognos are trade marks of International Business Machines Corporation, and are registered in many jurisdictions



Employee Portal

Boost satisfaction and productivity by granting your staff access to our user-friendly Employee Portal

Managing human resources poses a significant administrative challenge for many organisations. Pronto Xi's Employee Portal helps alleviate this burden by digitising processes and optimising workflows.

Developed as a fully adaptable web application, the Employee Portal empowers managers by giving them direct access to employee data. In tandem, employees can efficiently complete daily tasks using a computer, tablet, or smartphone.

No matter where your team members are located, they can:

- record timesheets and allowances
- review and update personal information like addresses, emergency contacts and banking details
- request leave and attach digital documents such as medical certificates
- access and print pay slips
- monitor submitted leave requests and timesheets
- estimate future leave balances
- confirm or reject work schedules
- define home page and other viewing settings to quickly access to essential tasks and information

Managers enjoy additional functionalities that enable them to:

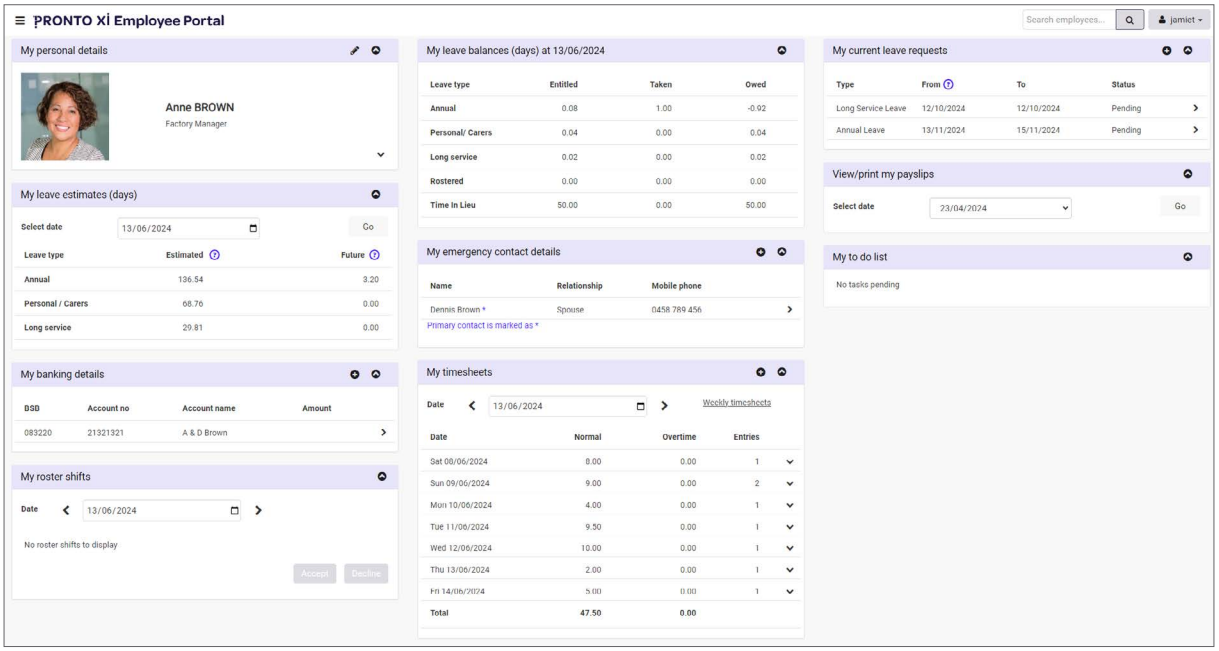
- organise their task lists, including pending time-off requests
- identify who is currently on leave
- approve timesheets
- forecast their teams' leave obligations during shutdown periods
- approve or reject leave requests via email

User administration

Integrated tightly with Payroll, the Employee Portal leverages your company's organisational chart to ensure that managers can only access information for employees within their reporting structure.

Administrators can define the features accessible to Employee Portal users, guaranteeing alignment with established policies and procedures. This level of control can even be tailored at an individual employee level, allowing administrators to selectively specify which employees can view personal/ carers' leave entitlements.

Administrators can also personalise the portal's colour scheme and incorporate their company logo.



Maintain information about your employees

Resource Management

Plan and manage human and equipment resource requirements with Resource Management

Pronto Xi's Resource Management integrates Payroll and Facilities Management modules, allowing you to comprehensively plan and manage resources.

Key features include:

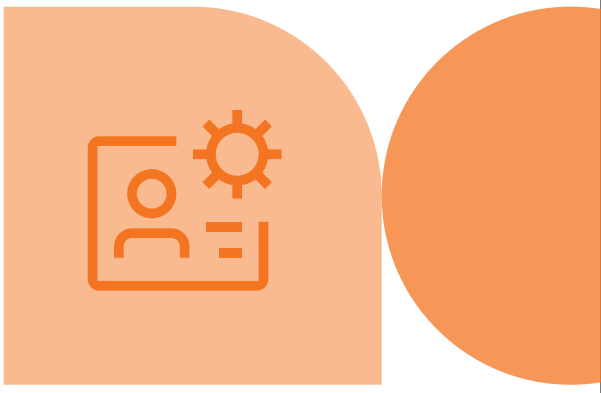
- resource attribute definition
- work cycles
- rosters
- time interpretation rules
- timesheet entries
- notifications

When used in conjunction with Resource Scheduler, Resource Management simplifies the process of scheduling resources and equipment across different Pronto Xi modules, providing you with real-time visibility into current resource allocations and giving you access to tools like Planner and Map view.

Resource master

A resource comes in the form of personnel, subcontractors or equipment. The Resource Management module connects these resources to various modules within Pronto Xi and interacts with modules like Payroll, Service, Project, Maintenance Management and Plant Maintenance. By establishing links between the modules, you access valuable information about resources across different areas of operation.

Resource management focuses on understanding the availability of resources, whether they meet job requirements and how effectively they are utilised. You can also define important attributes for each resource.



Work cycles

A work cycle is a period in a posted work schedule starting when the cycle begins and ending when it begins to repeat itself. The cycle may span days or weeks or a part of a day or week. You can also define a work cycle as a regular or irregular pattern, allowing you to accommodate any cycle pattern. In addition, it can define the available and scheduled time for a linked resource.

A default location also determines the global unavailability of resources for events such as public holidays or shut-down periods.

Rosters

A resource roster allows you to define the positions required to fulfil a roster, which ensures the resource has the required position qualifications to be assigned.

Rosters coincide with work cycles to determine resource availability. You can also set budgets for each roster and compare these to actual rostered costs, which offers full visibility and control.

Time interpretation

Resource Management can establish time interpretation rules showcasing a detailed breakdown of hours worked. This process involves categorising the total time worked into defined time buckets, representing normal and overtime components for a resource. Additionally, configure categories to include allowances for paid and unpaid breaks, start and finish times, and applicable allowances. An automatic allowance feature analyses work time components and applies relevant allowances based on predefined rules.

Pronto Xi's time interpretation rules are user-defined and flexible enough to handle the most demanding employment conditions.

Timesheets

Enter timesheets against a resource and analyse using the time interpretation rules to ensure your employees receive the correct pay.

You can also generate and automatically populate timesheets based on a resource's work cycle or roster, enabling managers to gain greater efficiencies.

Attributes

Attributes are user-defined characteristics that can be applied to your resources. Attributes help you understand what licenses or qualifications are available for a resource, and define insurance for subcontractors, load restrictions for equipment, and customer or equipment requirements. For example, you can state that a resource requires certain inductions for a specific customer.

Notifications

Resources accepts or declines work orders, project tasks or rosters via email without logging into Pronto Xi. This means resources 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.

Pronto Xi module integration

Resource Management integrates into the following Pronto Xi modules, highlighting the additional power it can provide to your business operations.

Payroll

Linking a resource to payroll allows you to apply a work cycle and use it with a leave request to determine the number of days or hours to be paid. In addition, by defining time interpretation rules, you can create timesheets and break them into time buckets for simplified payroll processing. Time interpretation rules automatically create allowances based on specific conditions to assist payroll processing further.

Time and attendance

Resource Management integrates with our partner, Bundy Plus. With this solution, time and attendance timesheets flow into Resource Management for time interpretation, which then flows through to Payroll to pay employee.

Facilities Management (Service, Project and Maintenance Management)

Connecting a resource to an engineer or project enables you to implement a work cycle that assigns calls or tasks to a resource. When assigning an event to your resource, you can instantly check availability, assuring you that they can complete the work. If the resource is also associated with a payroll record, any leave requests update the resource's availability, providing you with a comprehensive view of their schedule.

The facilities modules also use attribute hierarchies that you can configure to suggest suitable resources for the job. For example, a customer may have specific requirements for indications, or the equipment being serviced may demand particular skills. These attributes are automatically applied to all requirements so when you review a list of available resources for the job, only those matching the criteria are displayed.

Connecting a resource to a plant item can also trigger automatic unavailability if the plant item is being serviced via the Maintenance Management module.



Resource Scheduler

Quickly allocate resources and maximise efficiency with Resource Scheduler

Resource Scheduler helps you efficiently manage and schedule resources, teams and equipment — all in one place. The tool streamlines your resource allocation process and avoids the hassle of dealing with multiple systems.

In Pronto Xi, Resource Scheduler plans and tracks resource allocations across modules like Service, Project, Maintenance Management and Resource Management. It gives you a comprehensive view, ensuring projects are completed on time, within budget and without overburdening employees or resources.

It can be used to easily assign service engineers and equipment for various tasks and simplify maintenance work order assignments. By leveraging historical data, Resource Scheduler anticipates bottlenecks and slow periods to help you make more informed planning decisions. Whether task-based projects or specialised services, Resource Scheduler provides a visual way to estimate resource needs and allocate them accordingly. Use filters to quickly identify available resources for specific tasks.

Integration with Google Maps in Pronto Xi lets you track the location of your resources and optimise their routes based on proximity to job sites. Having this real-time visibility into current resource allocations means you can quickly adapt to unexpected situations in service organisations. It turns challenges into opportunities helping exceed customer expectations by allowing you to focus on genuine customer needs rather than just reacting to emergencies.

View types

The Resource Scheduler divides into two sections on the one screen: Unallocated Activities and Resource availability. The different types of views include:

Planner view

Planner view displays all Unallocated Activities across the modules and resources a user can access. Toggle it for a dedicated view of unallocated events (activities yet to be allocated to a resource) based on the module under review. The views for Unallocated Events are:

- Project Tasks
- Maintenance Work Orders
- Service Calls

Team colour-coding allows you to easily see how different teams are utilised, and a timescale toggle allows you to quickly move between the day, week and month view on both the Unallocated Activities and Resource Availability screen sections.

Map view

Utilising web-based map technology, Pronto Xi enables you to efficiently access a map or driving directions for your upcoming service call by simply clicking the appropriate map link on the screen. Service managers remain informed about the whereabouts of each service team member and can assign calls using real-time data such as traffic conditions, optimal routes and current location.

Service call map view

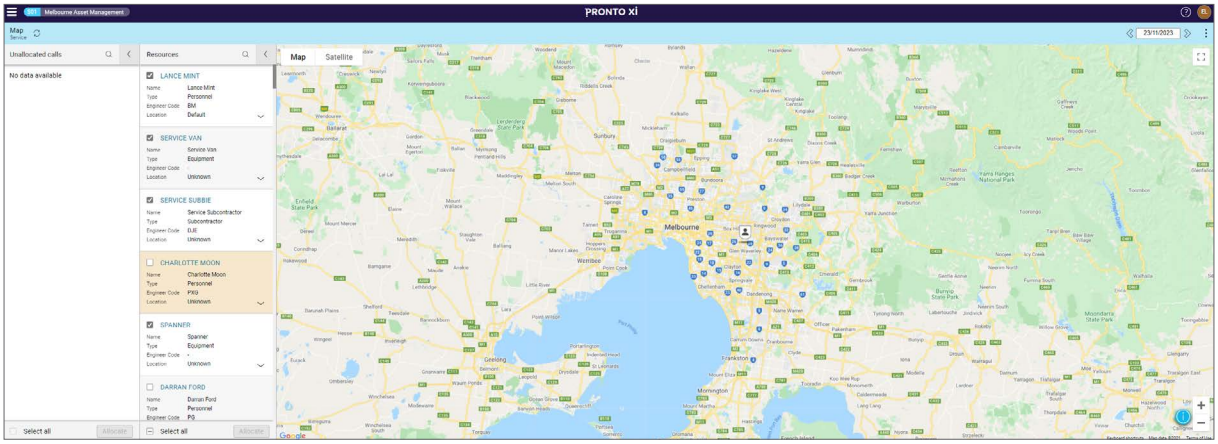
Service managers can locate the nearest available team member based on the service call address. With all the relevant resource information (including workload) readily available, it's easy to select a service team member and immediately allocate them to a call based on availability.

Best routes and location history

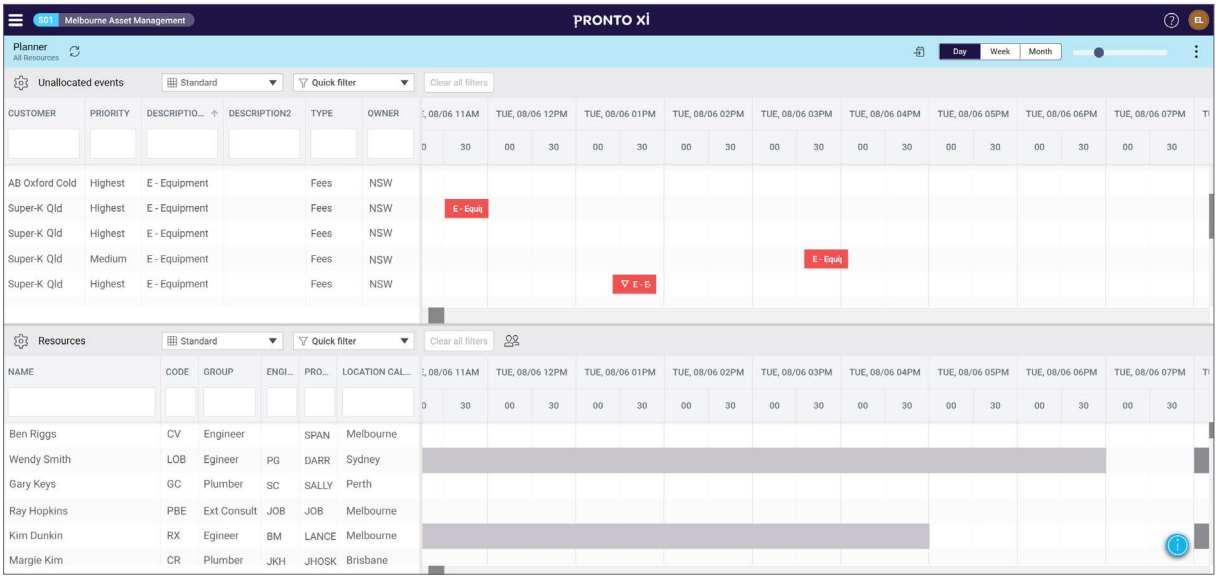
Service managers can review location history to enhance resource allocation strategies and boost customer service response times. By gaining insights into the whereabouts of your field resources, you can integrate cost-saving efficiencies into your organisation's workflows while upholding customer satisfaction and work health and safety standards.

Scheduler view

Scheduler view auto-refreshes automatically, or you can configure it to control the frequency of the refresh.



Optimise your planning with integrated Google Maps



Take an hourly view of your unallocated events and resources



About us

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 45 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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