



MYOB IMS Payroll Cloud

April 2019



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Introduction

The MYOB IMS Payroll Cloud launcher screen lets you open MYOB IMS Payroll applications and perform maintenance activities. This document describes the process of getting set up with IMS Payroll Cloud, as well as its key maintenance functions, which are accessed using the buttons at the right of the main window:



The following maintenance options are available:

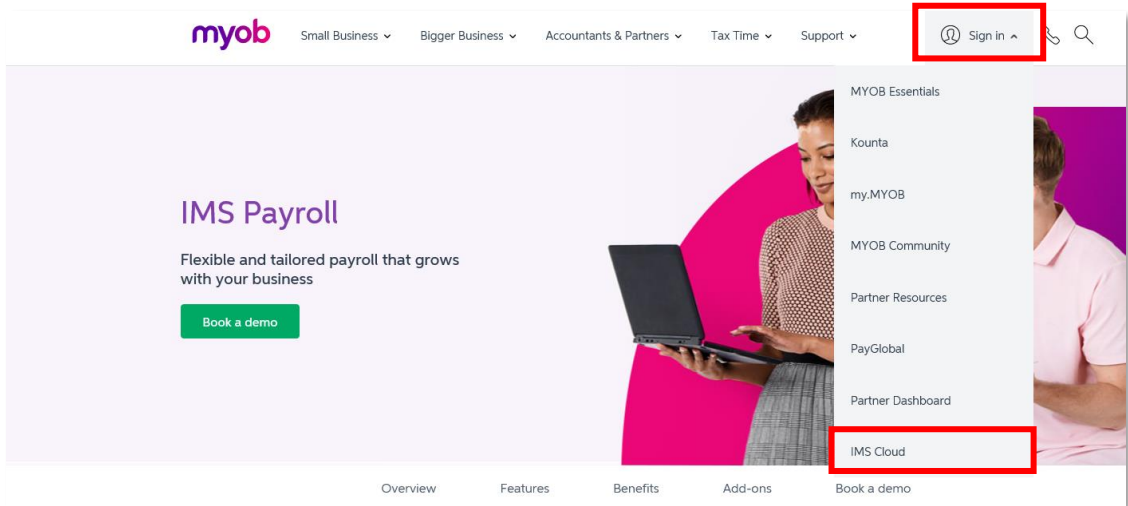
- Add a new IMS company (see page 7)
- Remove an existing IMS company (see page 10)
- Open the Toolkit Maintenance Utility, which lets you create and manage backups of IMS companies (see page 12)
- View documentation for IMS Payroll Cloud (see page 25)
- Change your IMS Payroll Cloud login password (see page 26)
- Log out of IMS Payroll Cloud

When an upgrade to IMS Payroll Cloud is available, it can be run from the MYOB IMS Payroll Cloud launcher (see page 27).

Getting Started

You will have received your login details for MYOB IMS Payroll Cloud (user name and password) in an email. To log in to IMS Payroll Cloud for the first time:

1. Open a web browser and go to www.myob.co.nz.
2. Select **IMS Cloud** from the dropdown menu under **Sign in**:

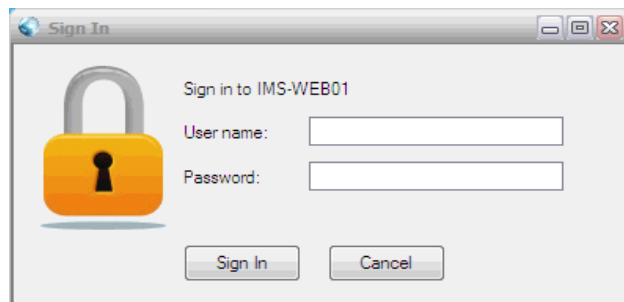


3. On the welcome screen, click the option to **Download** the GO-Global Add-on:

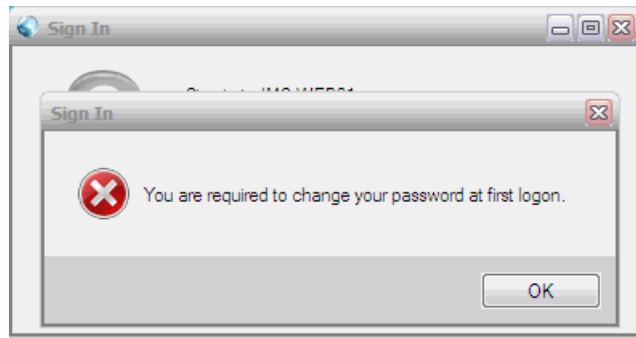


Note: The process of installing the plug-in will depend on the web browser you're using—see "Appendix: Browser Support" on page 29 for details.

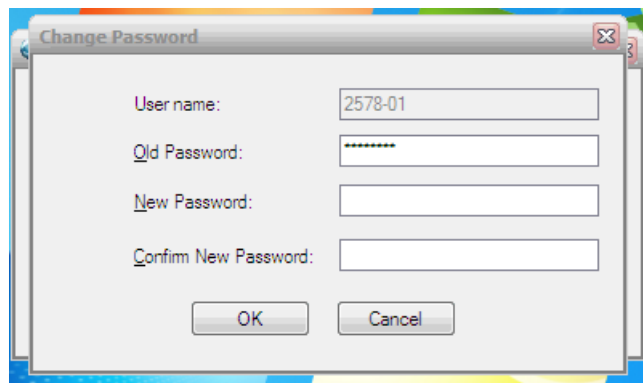
4. Once the plug-in is installed, a login window will appear. Enter the login details that were emailed to you.



5. The first time you log in, you'll need to change your password. Click **OK** to continue.



6. Enter your old password, then enter a new password (twice for confirmation) and click **OK**.



Your new password should meet the following criteria:

- it's at least seven characters long
- it doesn't contain your account or full name
- it contains at least three out of the following four character types:
 - uppercase characters (A to Z)
 - lowercase characters (a to z)
 - numerals (0 to 9)
 - special characters (!, @, #, \$, & etc.)

Note: You can change your password again at a later time from the MYOB IMS Payroll Cloud launcher screen—see "Changing Your Password" on page 26.

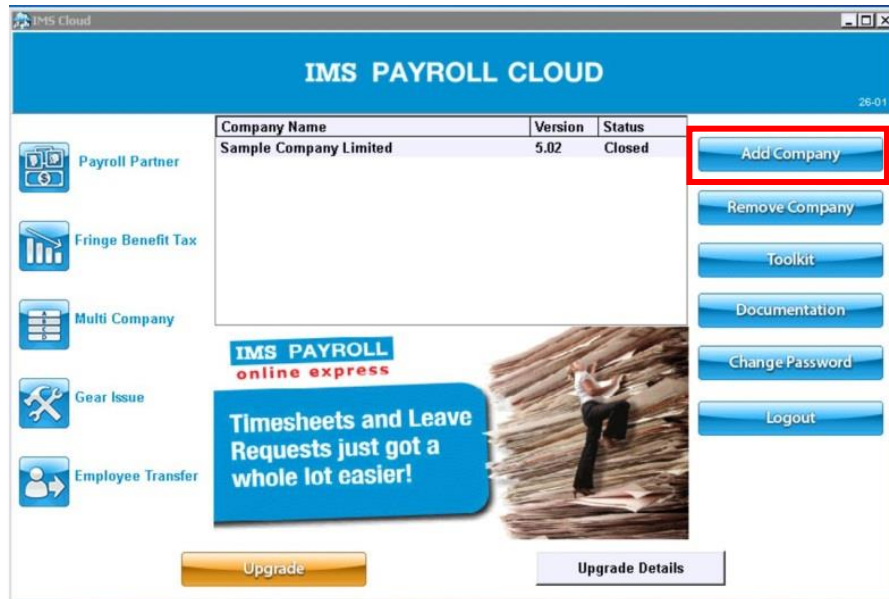
7. After you've changed your password, a window displaying Terms and Conditions appears. Agree to the Terms and Conditions, and you will be logged in to the IMS Payroll Cloud application.

Company Management

Adding a Company

To add a new company:

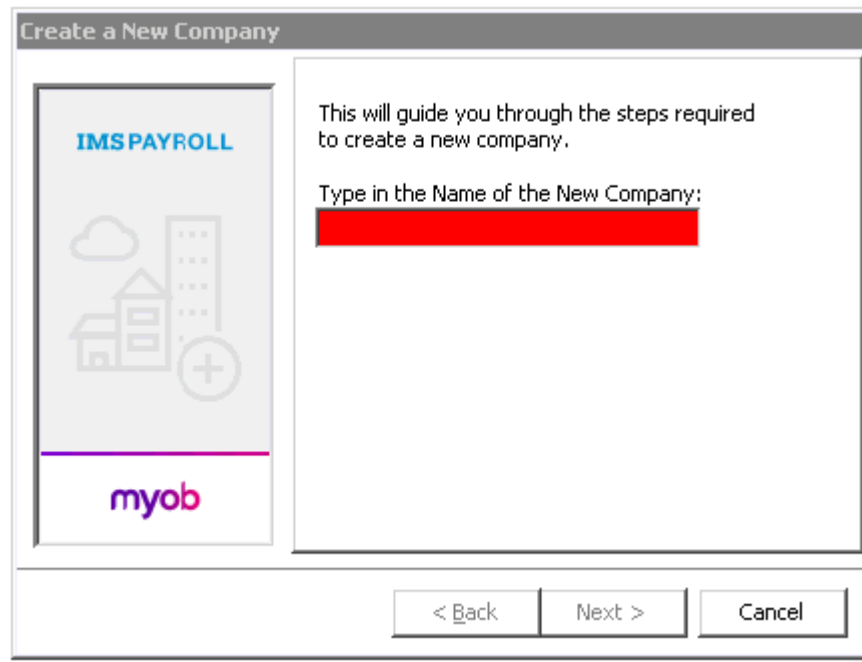
1. Click the **Add Company** button:



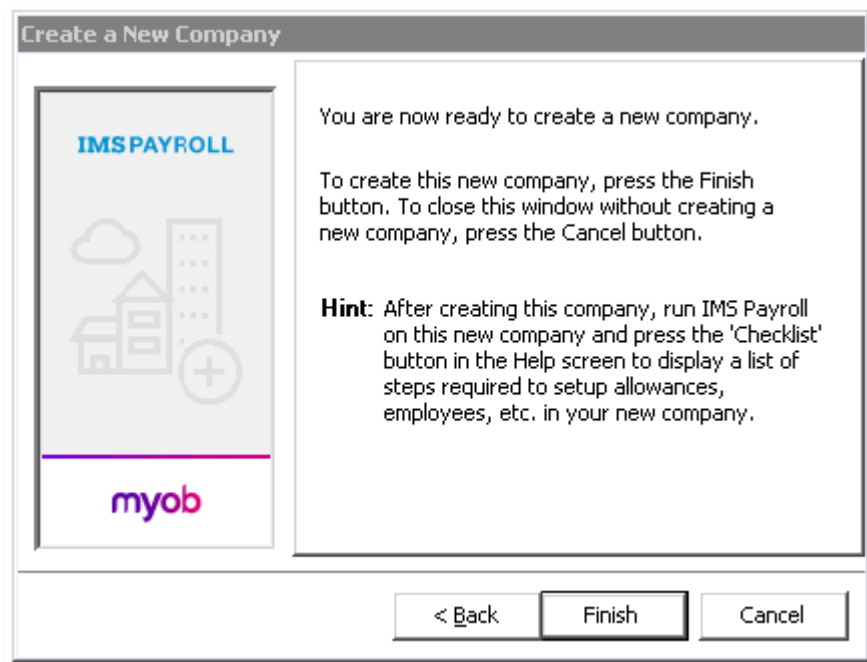
2. Select the version of IMS Payroll for the new company:




3. Enter the new company's name, then click **Next**.

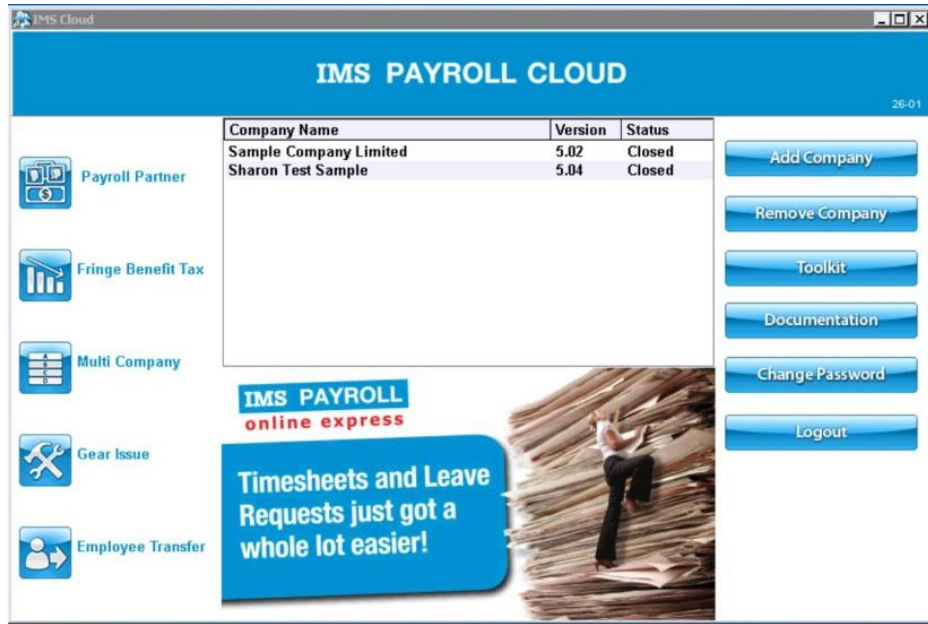


4. Click **Finish**.

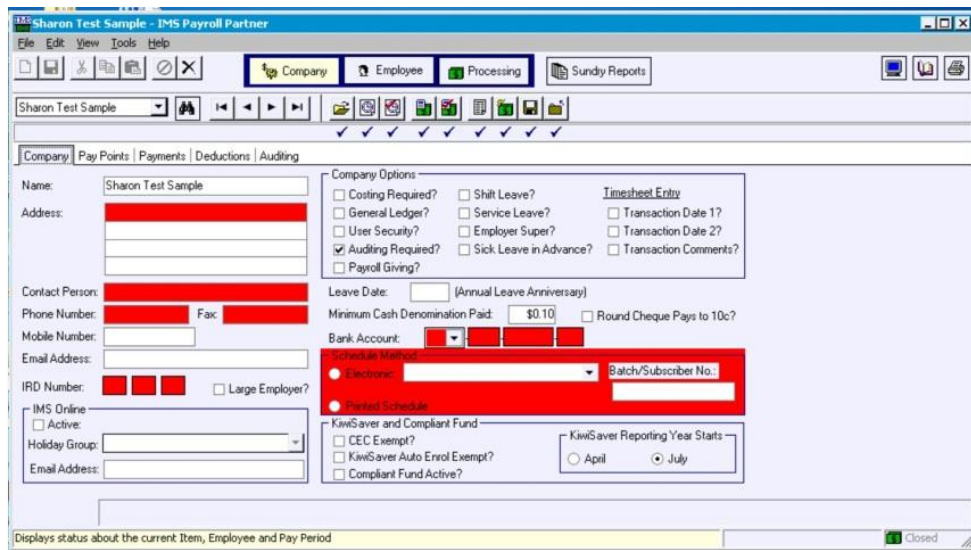


Note: To find the Checklist, click the Help button at the top right of the IMS Payroll window (), then click the "Quick Reference Checklist" topic on the Contents tab.

- You will be taken back to the main control panel, which will show your newly created company. Double click on the new company to open it.



- Complete the company setup as normal—see the online Help and your startup manual for more information.



Transferring a Desktop Company to IMS Payroll Cloud

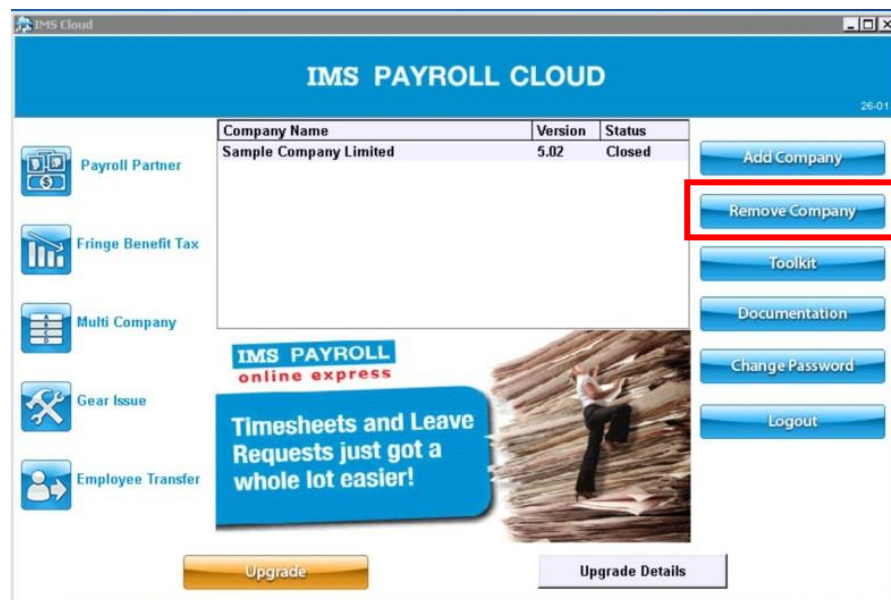
To transfer a desktop company to IMS Payroll Cloud, first add the company, following steps 1 – 4 in “Adding a Company” above. Instead of entering the company data manually (steps 5 and 6 above), perform the following steps to migrate data from the desktop company into the new cloud company:

- Upload a backup of the desktop company to IMS Payroll Cloud—see “Uploading a Company Backup File” on page 22 for information on this process.
- Restore the company backup to the new cloud company—see “Restoring a Company Backup” on page 17 for information on this process.

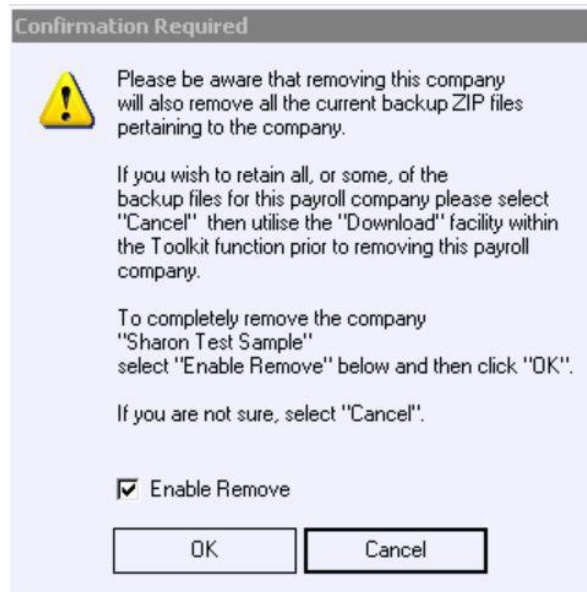
Removing a Company

To remove a company from IMS Payroll Cloud:

1. Select the company to remove and click the **Remove Company** button:



2. Read the confirmation notice to ensure that you want to go ahead with the company removal. If you do not want to remove the company, click **Cancel**.



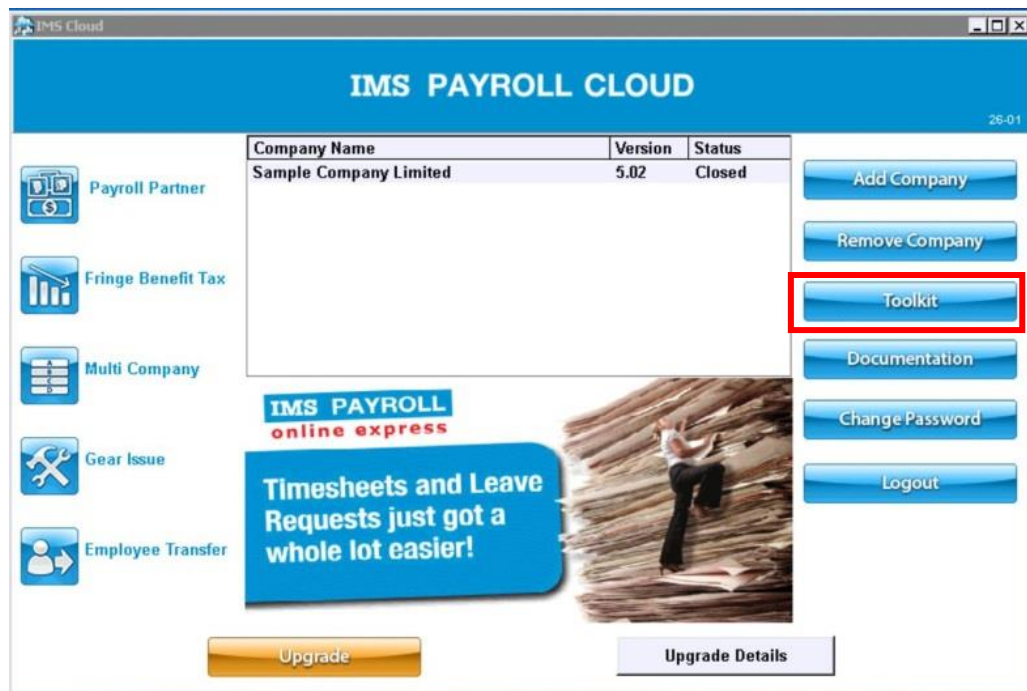
3. If you are sure you want to remove the company, tick the **Enable Remove** box, then click **OK**.

Using the Toolkit

The Toolkit Maintenance Utility lets you perform the following maintenance operations on a company:

- Repair a company file (see page 13)
- Create a company backup (see page 14)
- Restore a company backup (see page 17)
- Download a company backup as a zip file (see page 20)
- Upload a backup of the company from a local file (see page 22)
- Delete old company backups (see page 24)

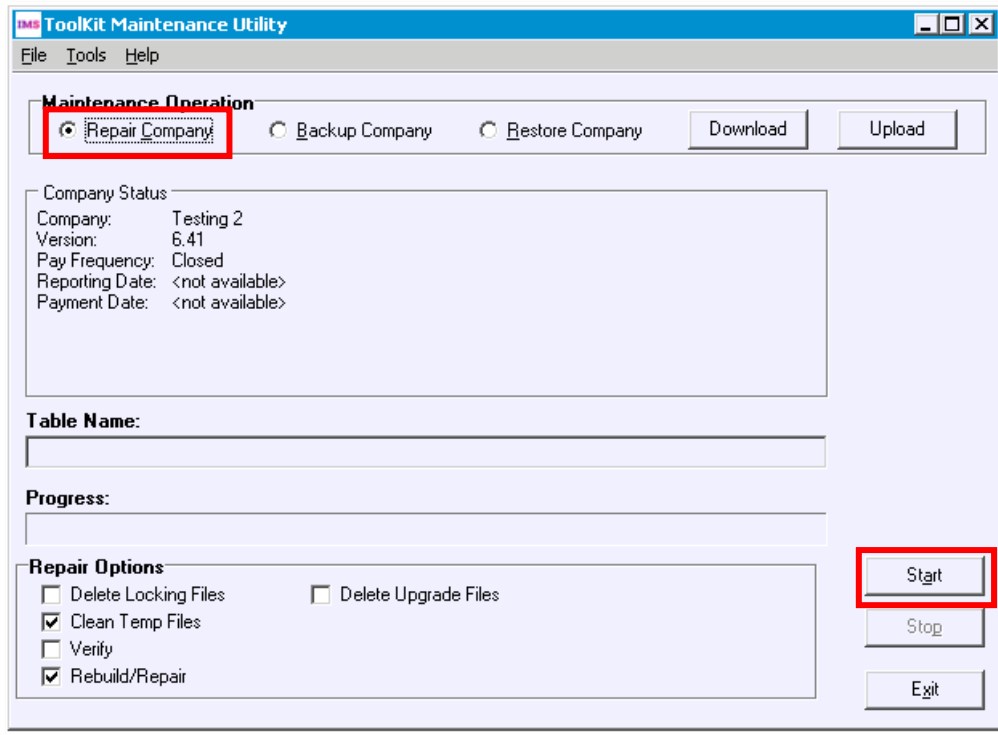
To open the Toolkit and perform maintenance on a company, select the company, then click the **Toolkit** button:



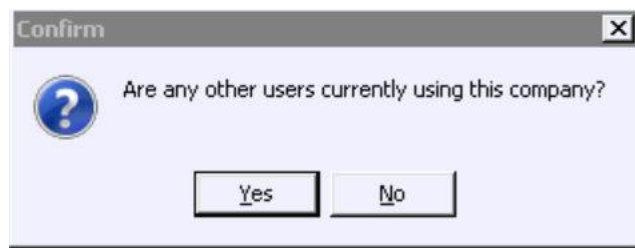
Repairing a Company

To repair a company file:

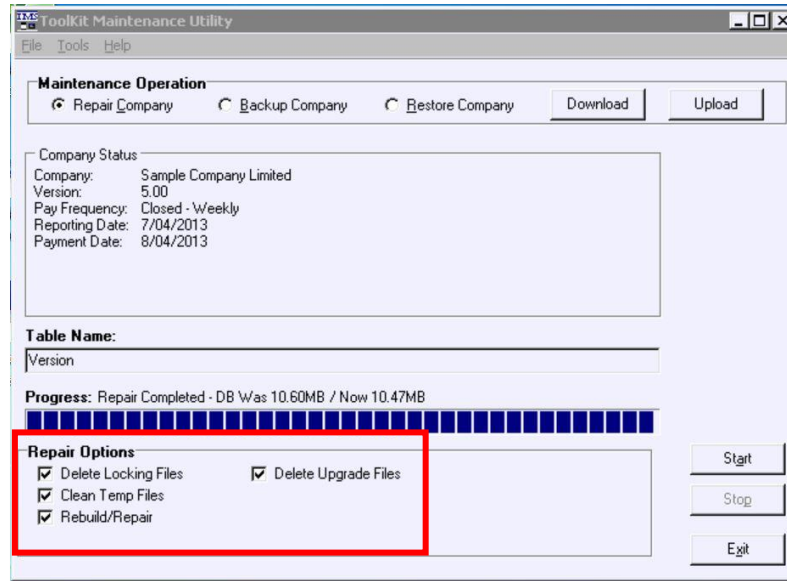
1. Select the company to repair and click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, select the **Repair Company** option and click **Start**.



3. A confirmation message appears. Click **Yes** or **No** as appropriate.



4. Select the repair operations to perform by ticking or clearing the boxes in the **Repair Options** section.

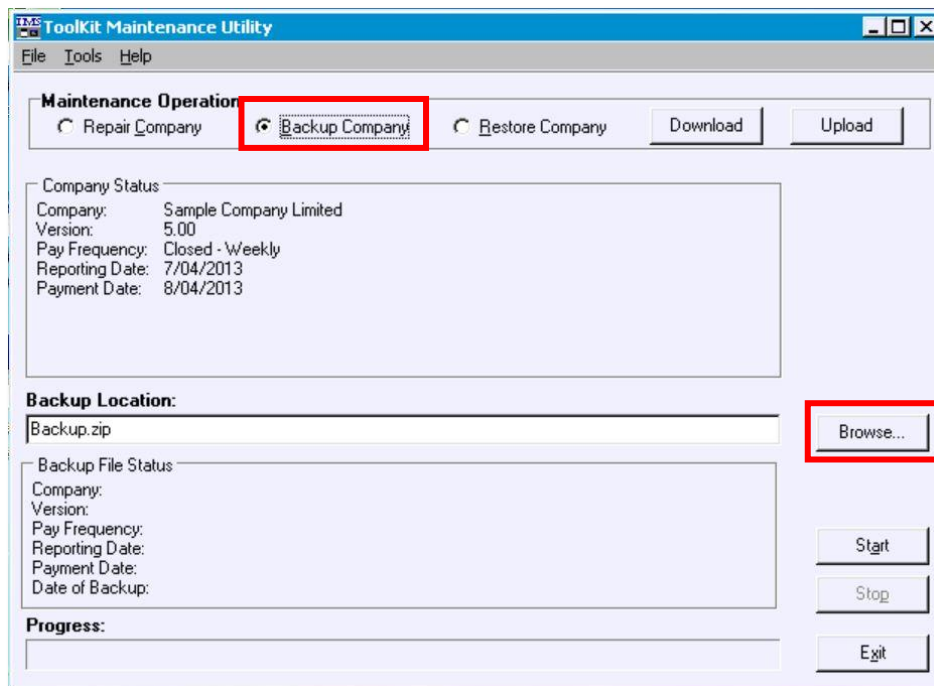


5. Click the **Start** button. The progress bar shows the status of the repair operation and will advise you when it is complete.

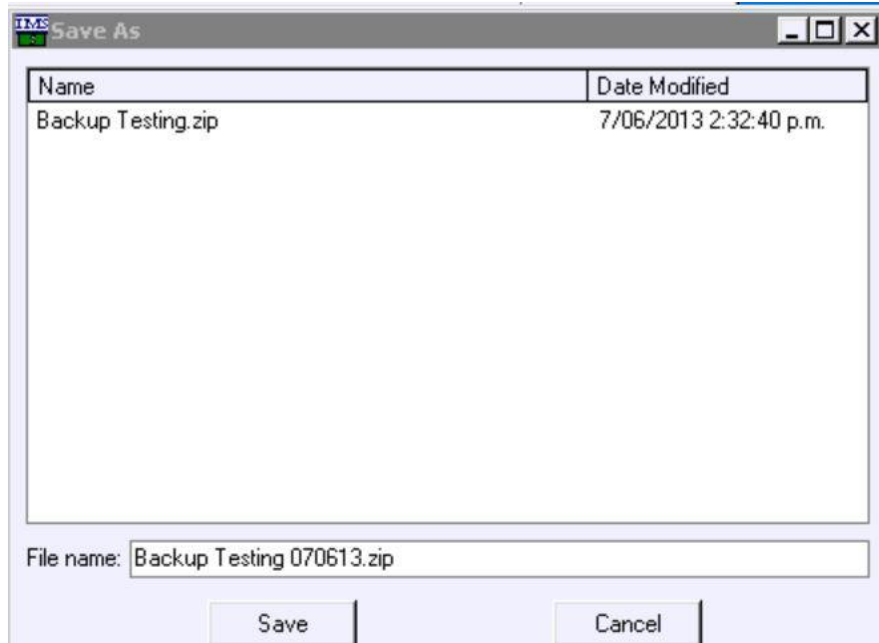
Creating a Company Backup

To create a backup of a company file:

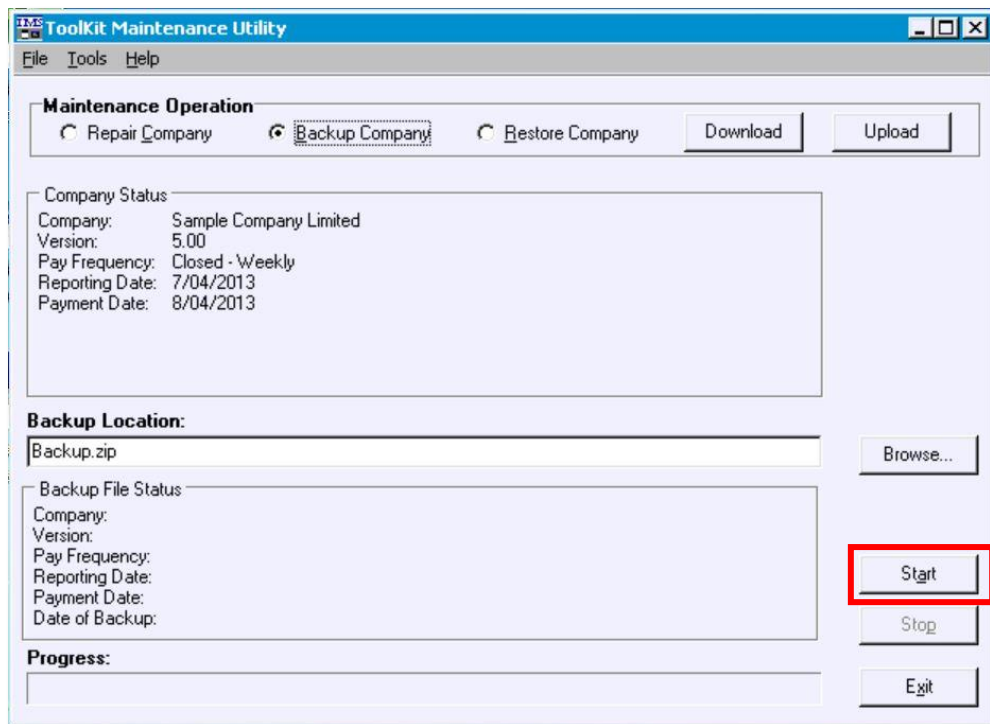
1. Select the company to back up and click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, select the **Backup Company** option and click **Browse**.



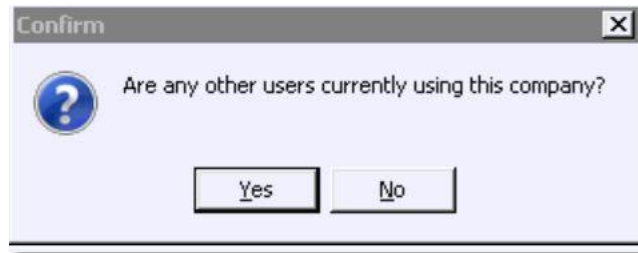
3. Enter a file name for the backup, then click **Save**.



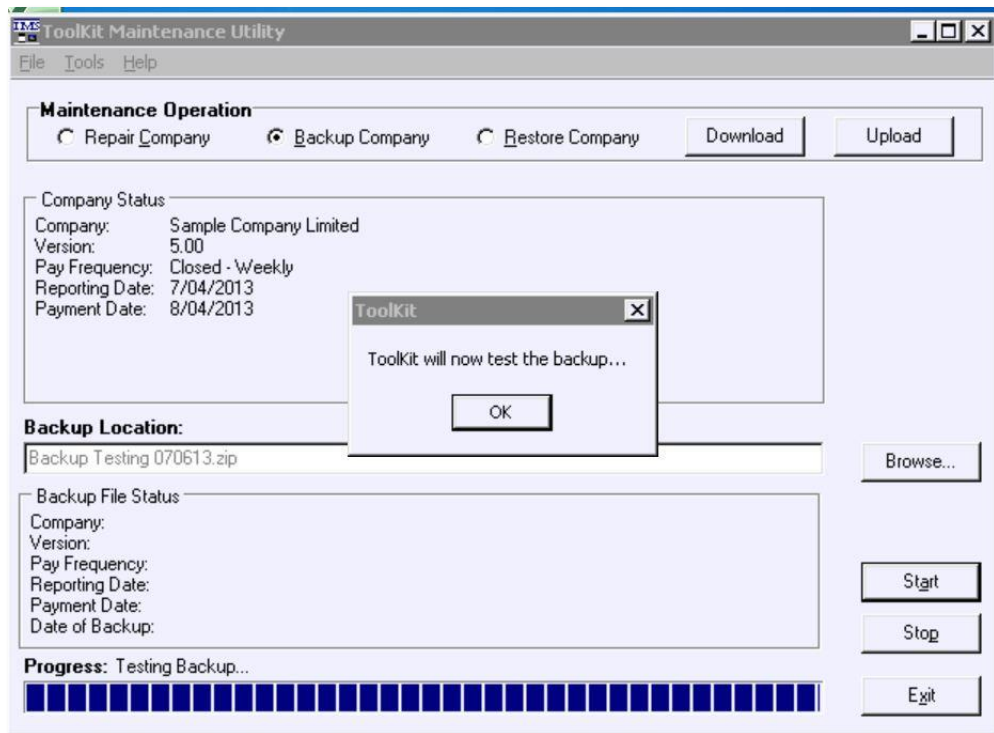
4. Click **Start**.



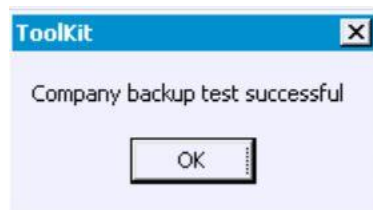
5. A confirmation message appears. Click **Yes** or **No** as appropriate.



6. The progress bar shows the status of the operation. Once the backup is created, a notification message appears. Click **OK**.



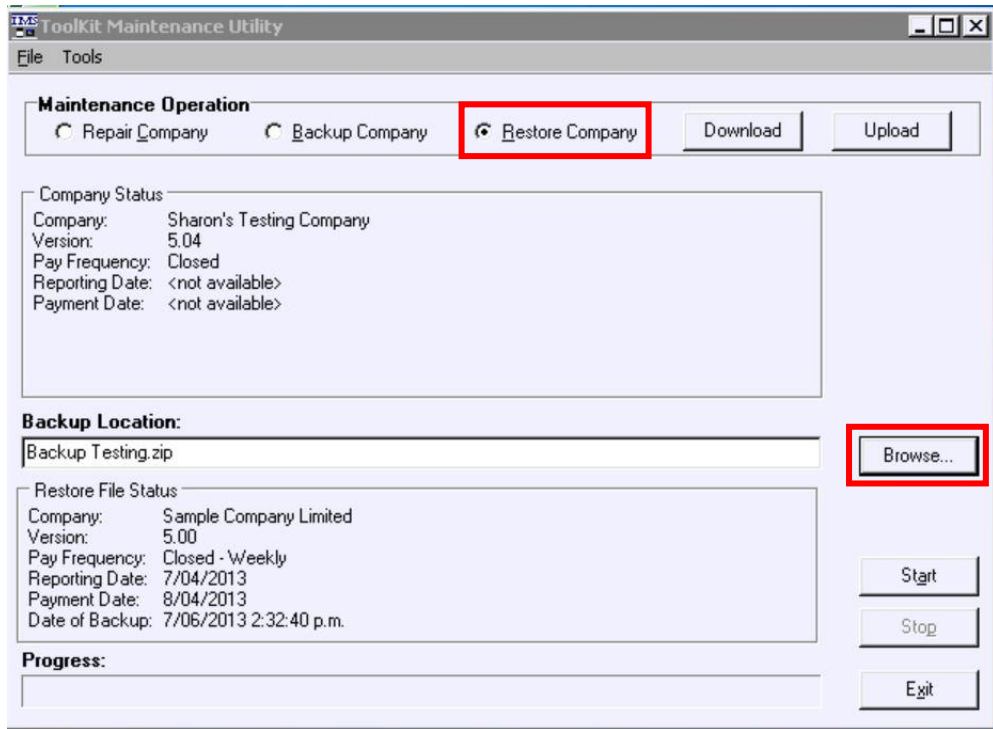
7. If the test is successful, a confirmation message appears. Click **OK** to close the message.



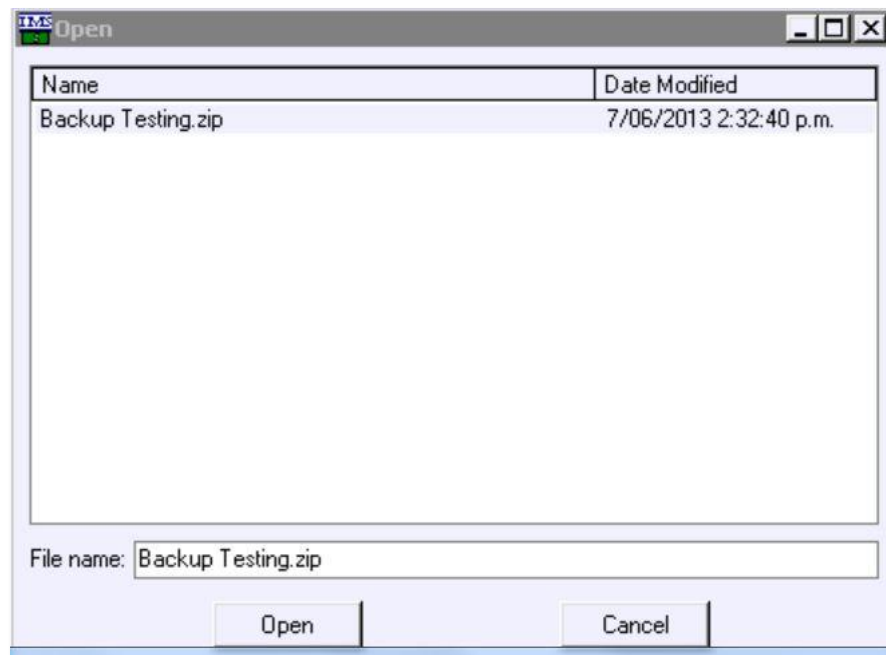
Restoring a Company Backup

To restore a company from a backup file:

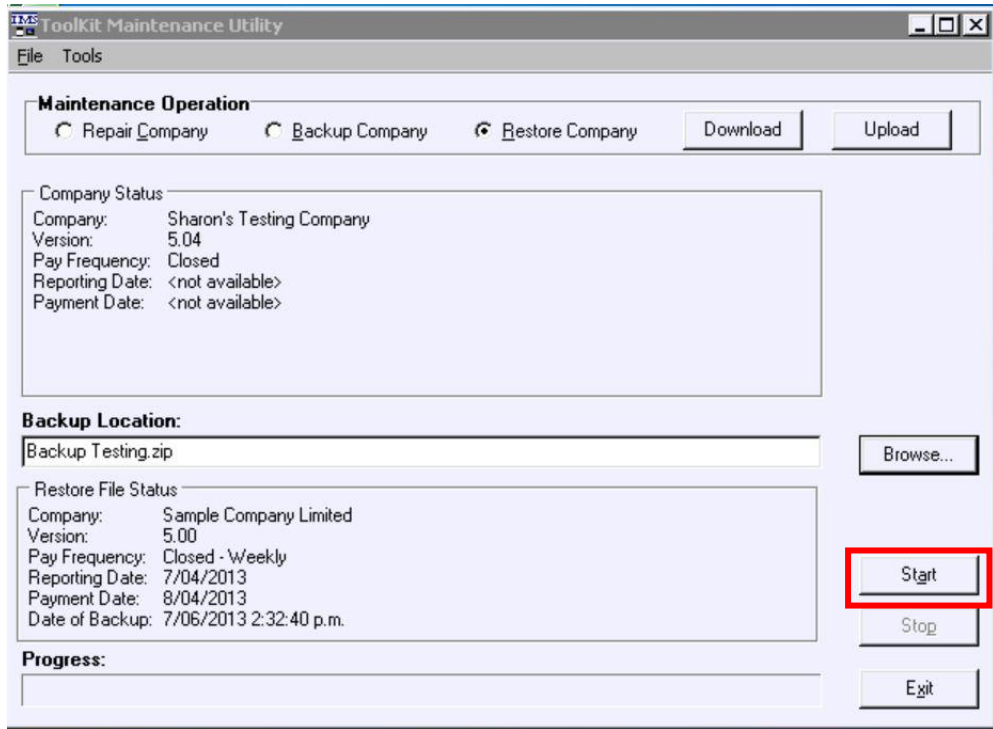
1. Select the company to restore and click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, select the **Restore Company** option and click **Browse**.



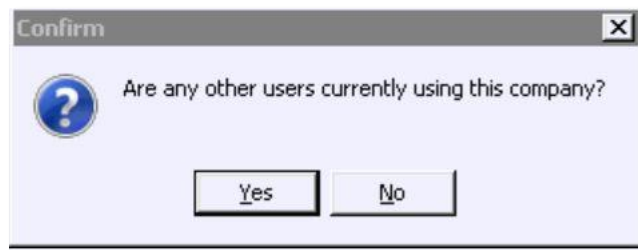
3. Select the backup to restore and click **Open**.



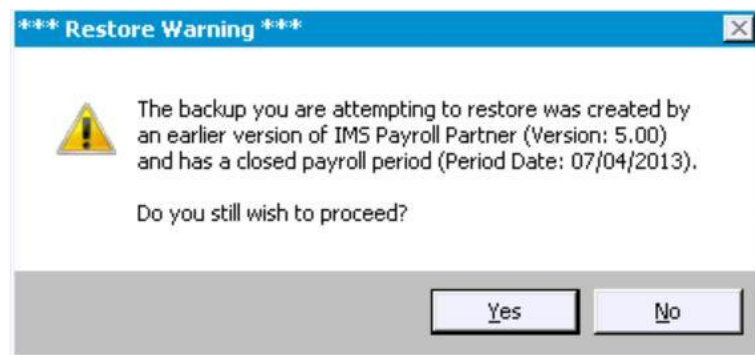
4. Click **Start**.



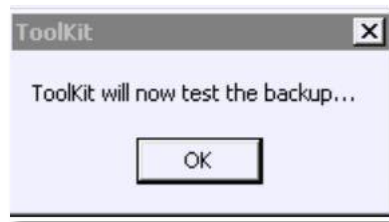
5. A confirmation message appears. Click **Yes** or **No** as appropriate.



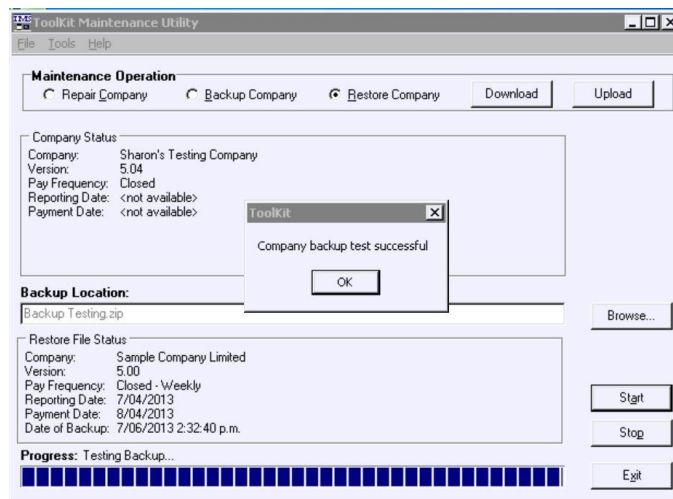
6. If you are restoring an earlier version, a warning will appear asking if you wish to proceed. Click **Yes** to continue or **No** to cancel the restore operation.



7. Toolkit tests the company backup. Click **OK** to continue.



8. If the test is successful, a confirmation message appears. Click **OK** to close the message.



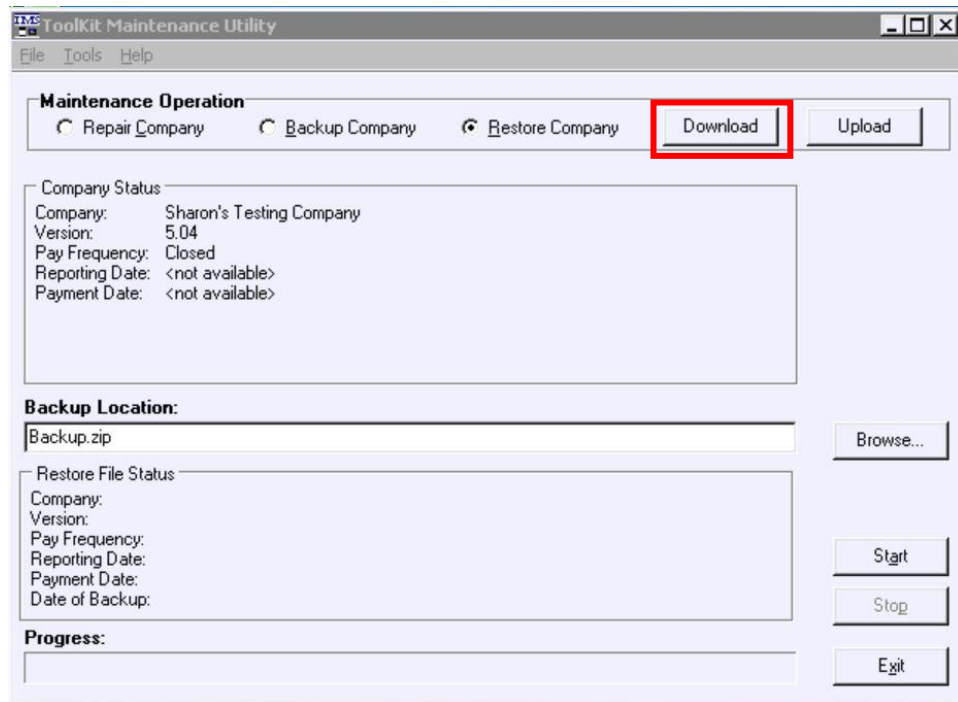
9. A confirmation message appears once the restore operation is complete. Click **OK** to close the message.



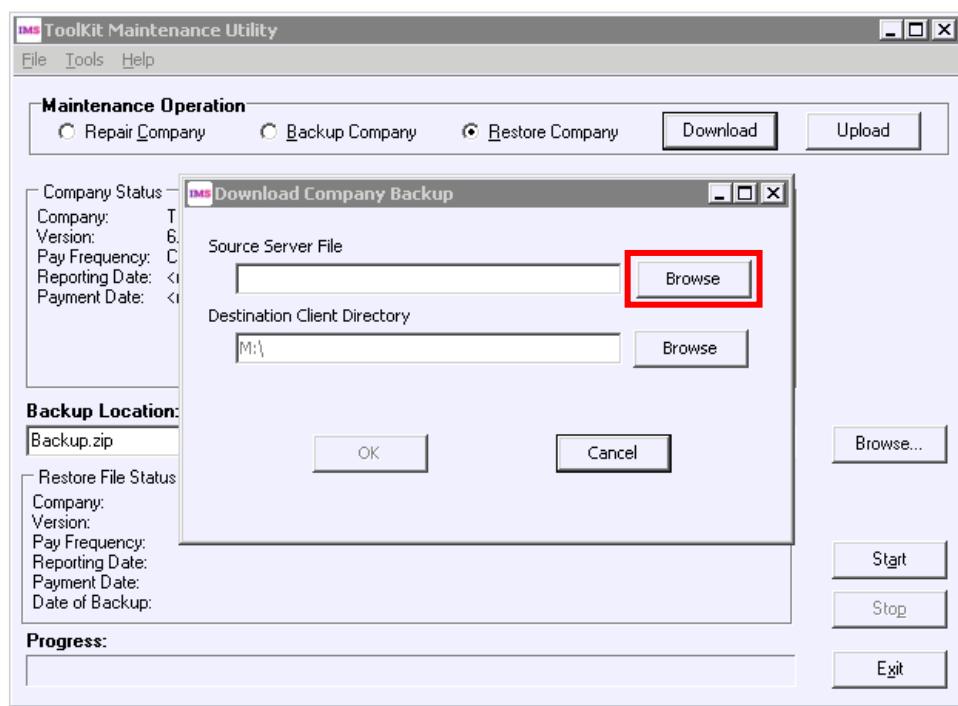
Downloading a Company Backup File

To download a company backup from IMS Payroll Cloud:

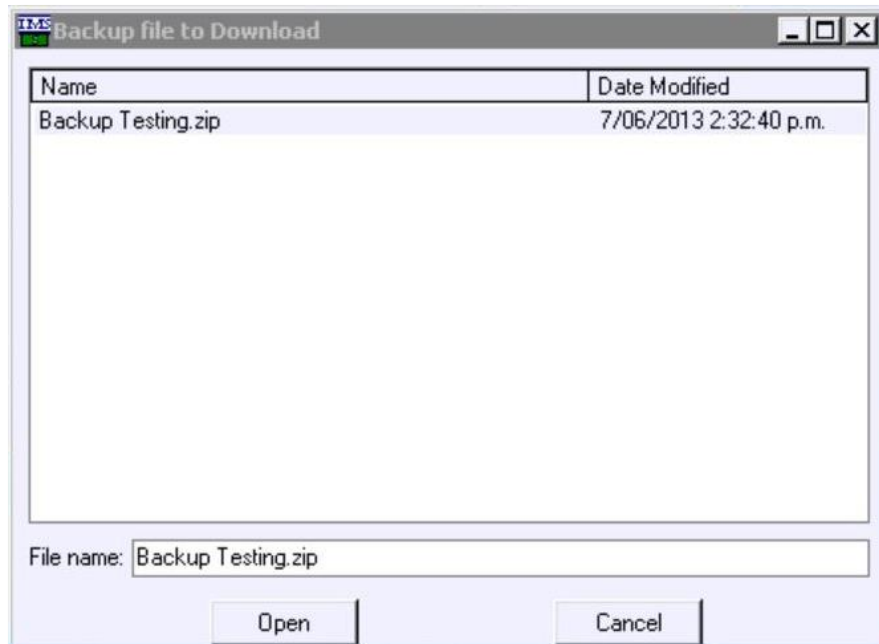
1. Select the company to remove and click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, click the **Download** button.



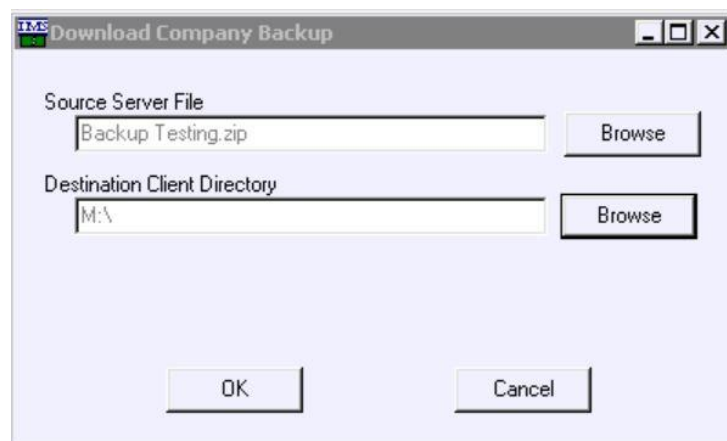
3. On the window that appears, click the **Browse** button next to the **Source Server File** field.



4. Select the back file that you want to download and click **Open**.



5. Ensure that the correct backup has been selected. The destination client directory will automatically default to M: (your local drive). Click **OK**.

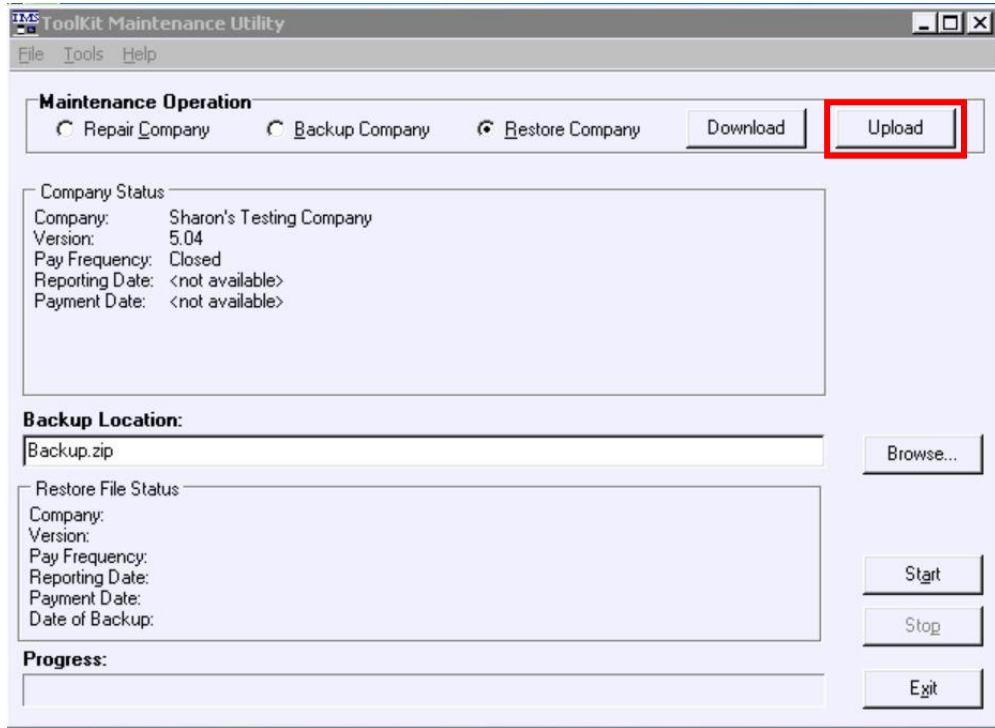


6. A "Download completed" confirmation message appears. Click **OK** to close the message.

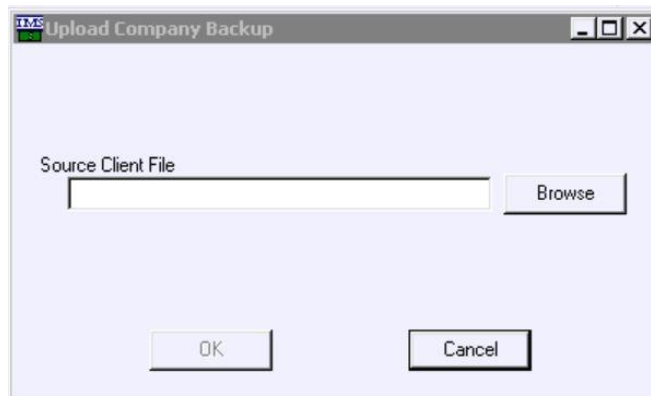
Uploading a Company Backup File

To upload a company backup to IMS Payroll Cloud:

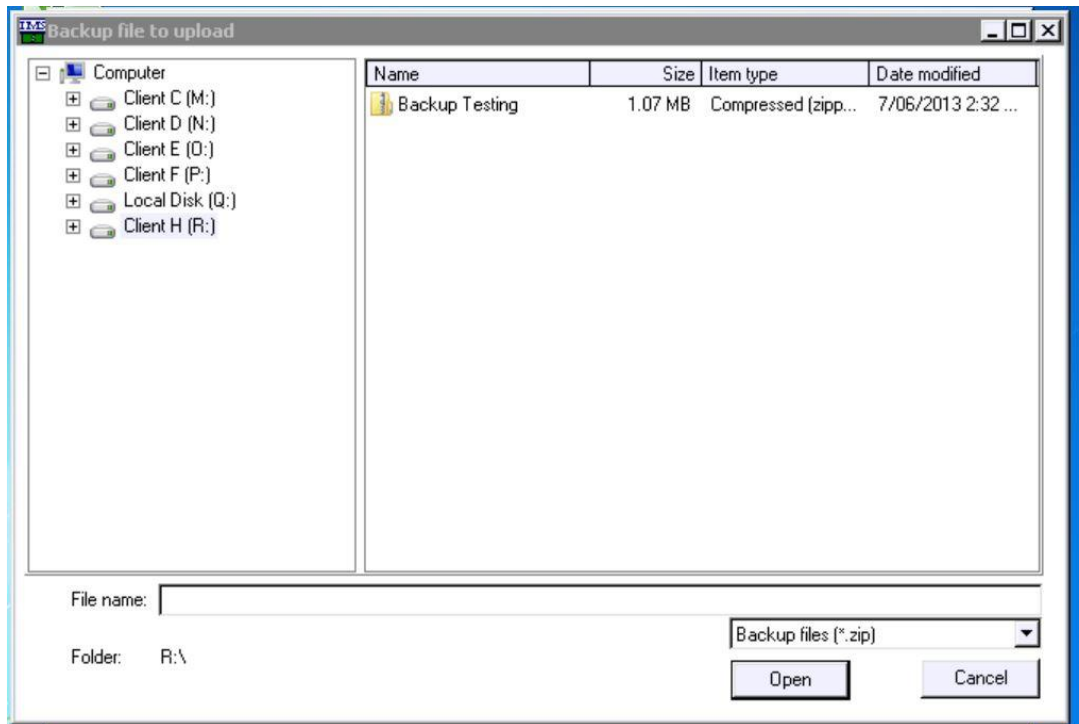
1. Click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, click the **Upload** button.



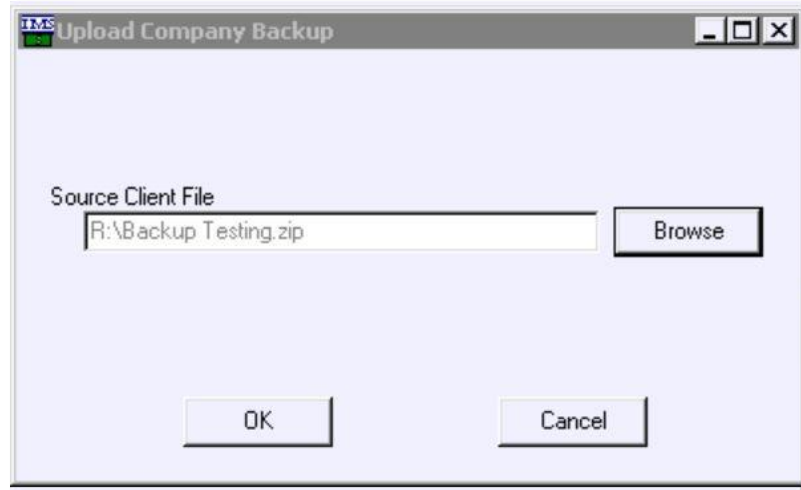
3. On the window that appears, click **Browse**.



4. Use the browse window to select the backup file that you want to upload, then click **Open**.



5. Confirm that you have selected the correct backup file, then click **OK**.

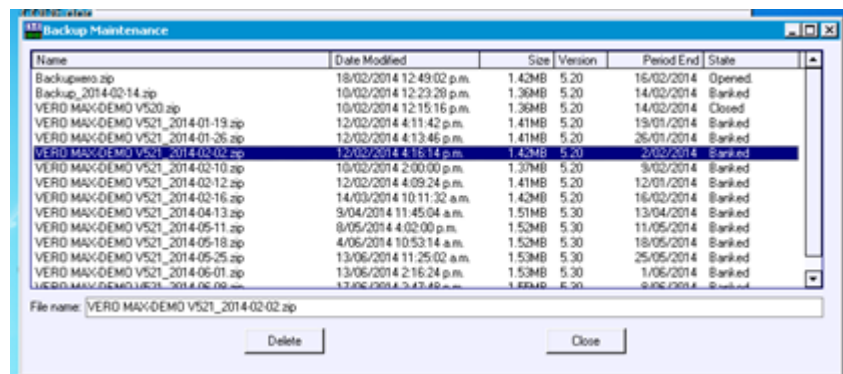


6. An "Upload completed" confirmation message appears. Click **OK** to close the message.

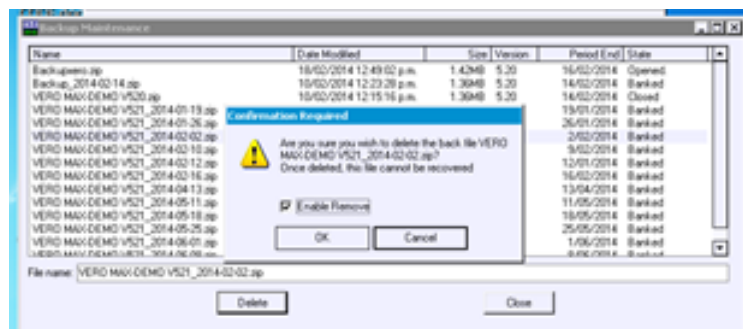
Deleting Old Backups

To delete old company backup files that are no longer needed:

1. Select the company whose backups you want to manage and click the **Toolkit** button.
2. On the Toolkit Maintenance Utility window, select **Maintain Backups** from the Tools menu.
3. A window appears showing all saved backups for the company. Select the backup you want to delete, then click the **Delete** button.



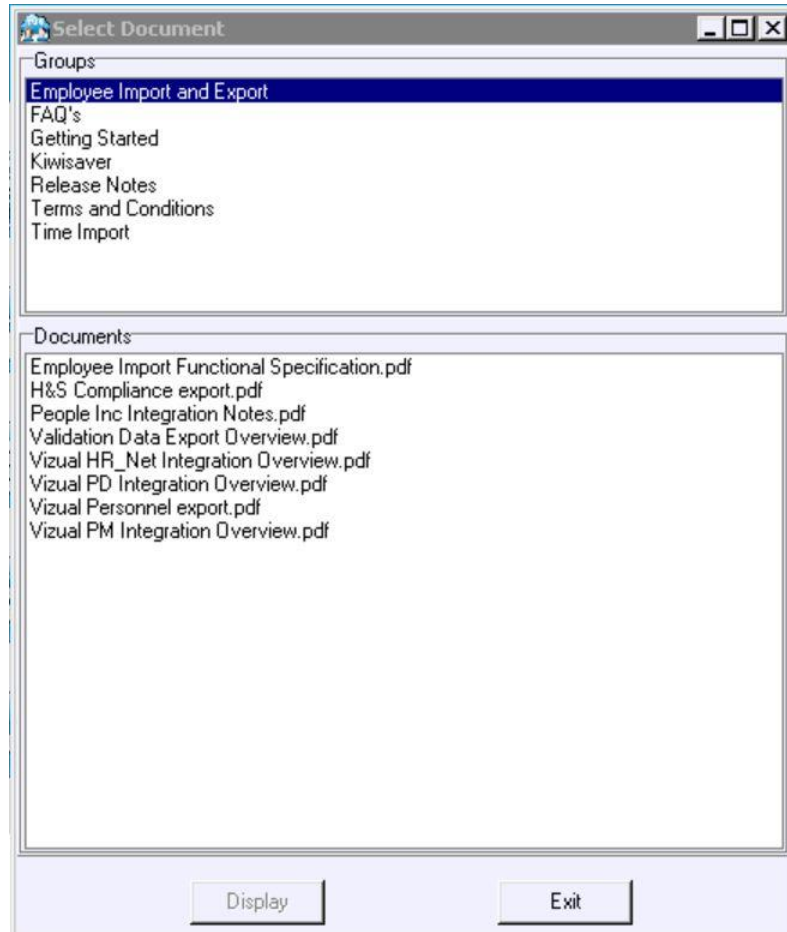
4. A confirmation window appears. Check that the backup you are deleting is the correct one, then tick the **Enable Remove** box and click **OK**.



5. Repeat steps 3 and 4 for all backups you want to remove. Once you have removed all of the backups that you want to, click the **Close** button to return to the Toolkit Maintenance Utility window.

Viewing Documentation

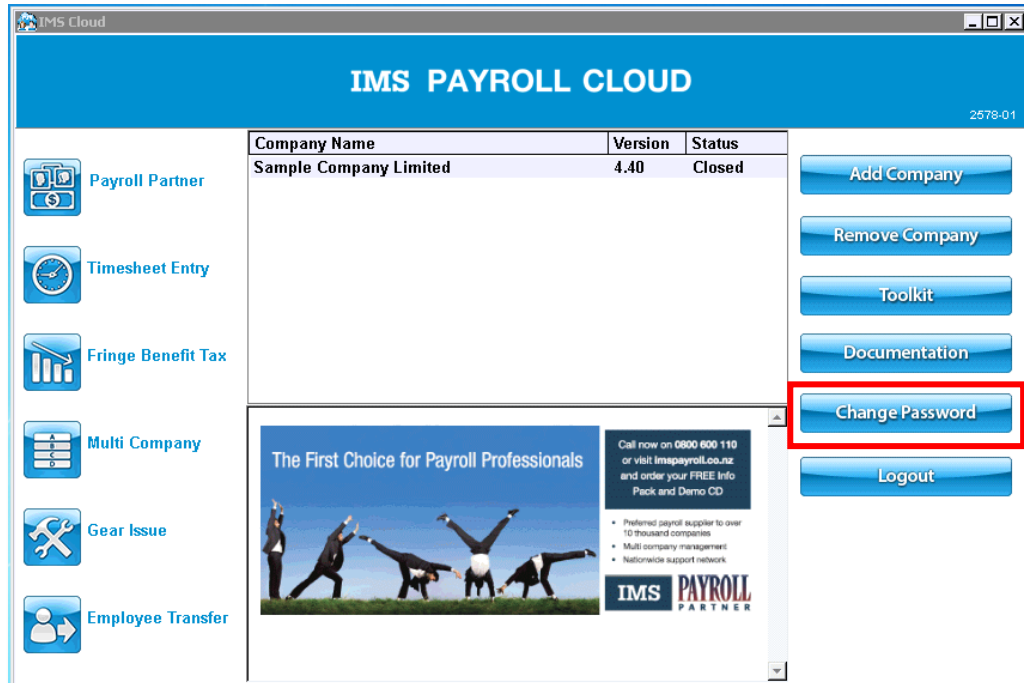
Documentation for IMS Payroll Cloud is available in PDF format. To access the documentation, click the **Documentation** button. This opens the Select Document window:



Documents are arranged in groups. Select a group, and all available documents in that group appear in the Documents section. Select a document and click **Display** to open the PDF.

Changing Your Password

To change your login password for IMS Payroll Cloud, click the **Change Password** button:



This opens the Change Password window:



Enter your old password, then enter a new password (twice for confirmation) and click **OK**.

Upgrading IMS Payroll Cloud

When an upgrade of the software is available for the selected company, a gold **Upgrade** button appears at the bottom left side of the main window after you have closed the current pay period for that company.

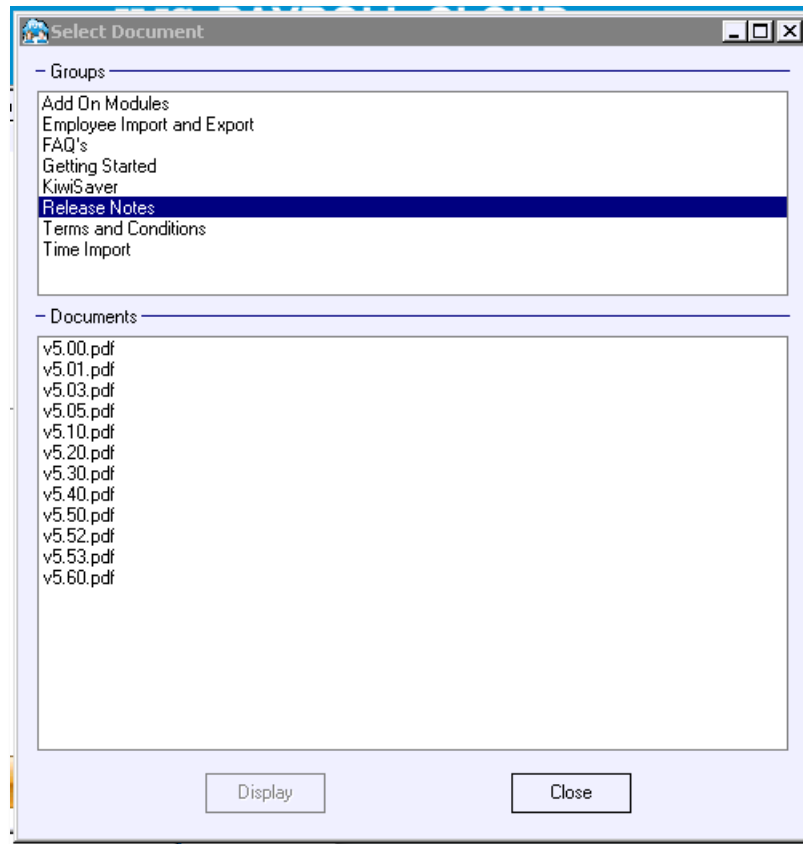
It is extremely important that you upgrade when this button appears, but only after you have read the upgrade documentation.



For an overview of the changes in an upgrade, click the **Upgrade Details** button:



More detailed information is available in the Release Notes document for each upgrade, which you can view in the Release Notes group on the Documents window (see page 25).



Once you have read all upgrade information, click the gold **Upgrade** button to begin the upgrade.

Appendix: Browser Support

MYOB IMS Payroll Cloud has been designed to operate using the following web browsers:

- Microsoft Internet Explorer – version 10 or later
- Mozilla Firefox
- Google Chrome
- Apple Safari on Mac

If you are running a version of Internet Explorer earlier than 10, a notification will appear at the top of the screen. If you get this notification, update your version of Internet Explorer or use either Firefox or Chrome.



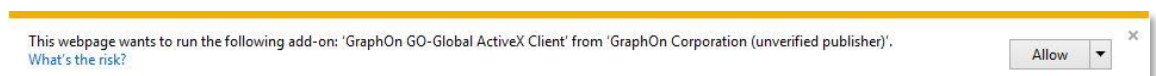
The first time you access IMS Payroll Cloud, you'll need to download and install the Browser GO-Global Add-on. The process of installing the add-on differs by browser.

Installing on Microsoft Internet Explorer

1. Click the **Download the GO-Global Add-on Installer** link at the top of the welcome screen.
2. Click **Run** and then **Run** again.



3. Click **Allow**.



After the installer runs, restart your browser. The add-on will be installed and you are ready to use IMS Payroll Cloud.

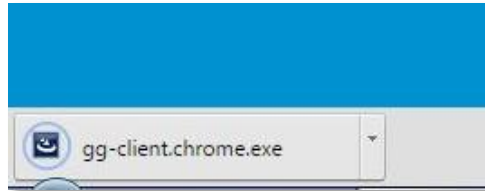
Internet Explorer 11

If the add-on will not install on IE11, you will need to run IE11 in Administrator Mode and try installing again. To run IE11 in Administrator Mode:

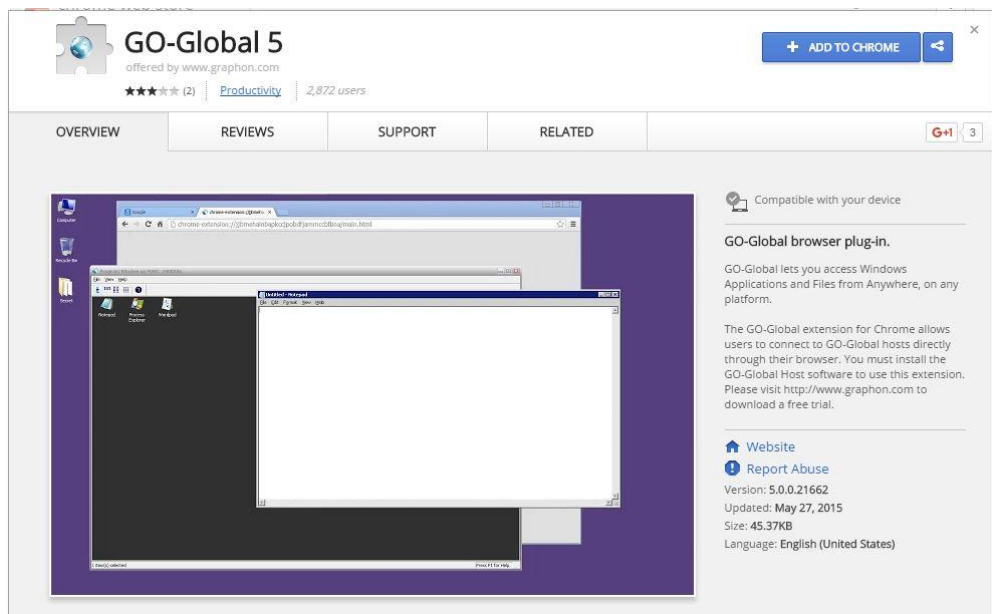
1. Open Windows Explorer and go to the **C:\program files\Internet Explorer** folder.
2. Right-click on **iexplore.exe** and select **Run as administrator**.
3. Download and run the GO-Global Add-on Installer again.

Installing on Google Chrome

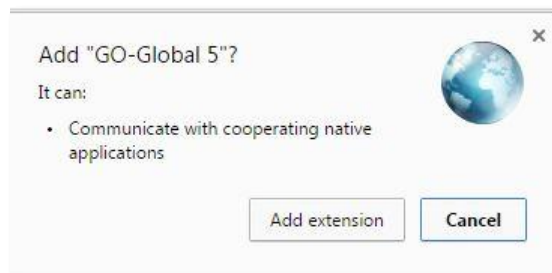
1. Click the **Download the GO-Global Add-on Installer** link at the top of the welcome screen.
2. Run the downloaded installer **gg-client.chrome.exe**.



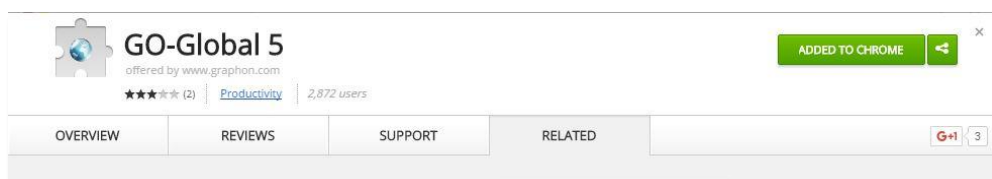
3. On the screen that appears, click **Add to Chrome**.



4. Click **Add extension**.

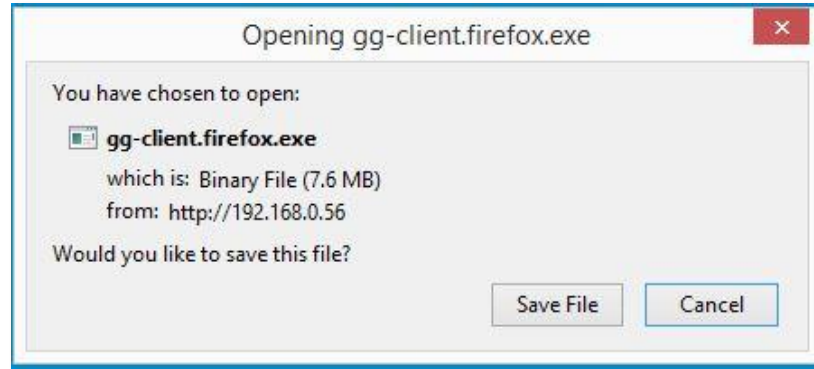


5. Once the screen displays **Added to Chrome** the add-on has been installed and you are ready to use IMS Payroll Cloud.

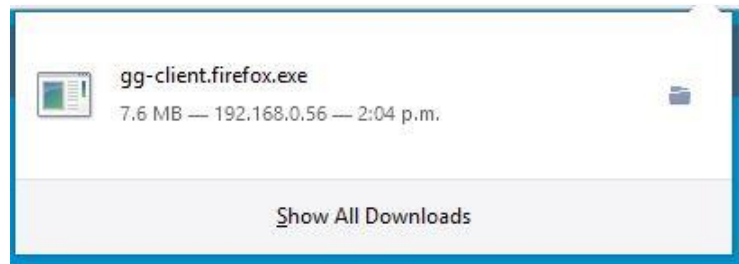


Installing on Mozilla Firefox

1. Click the **Download the GO-Global Add-on Installer** link at the top of the welcome screen.
2. Click **Save File**.



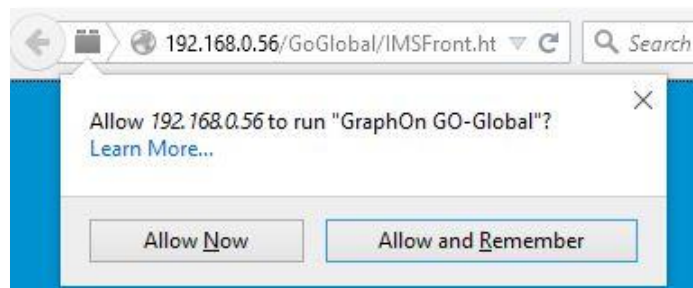
3. Click **gg-client.firefox.exe**.



4. Click **Allow**.



5. Click **Allow and Remember**.



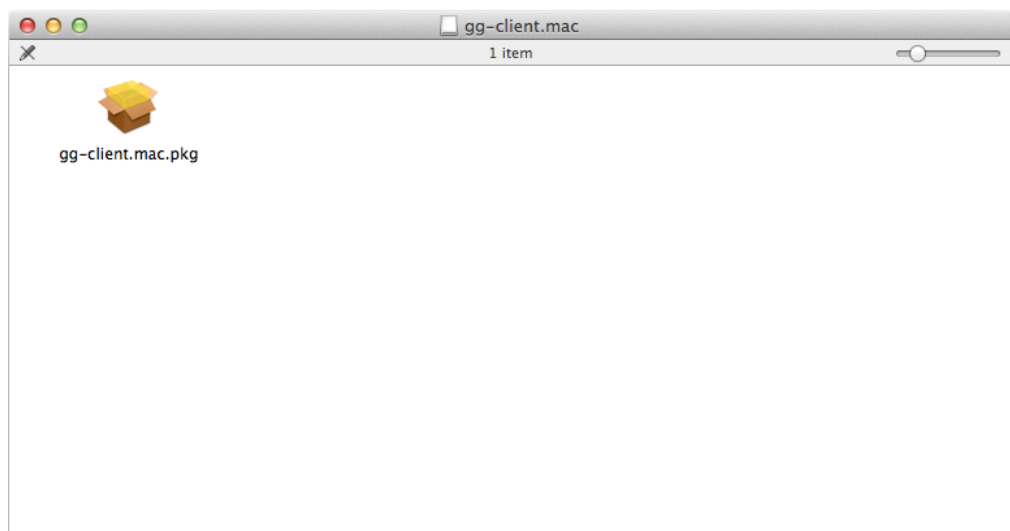
After the installer runs, restart your browser. The add-on will be installed and you are ready to use IMS Payroll Cloud.

Installing on Apple Safari

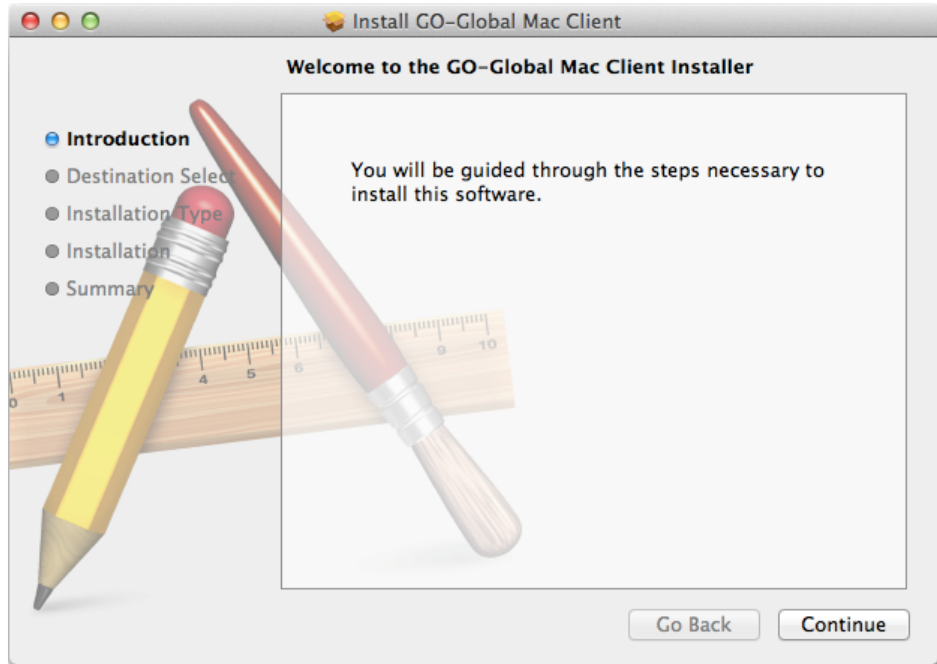
1. Click the **Download the Mac OS X Client installer** link at the top of the welcome screen.
2. Click **gg-client.mac.dmg**.



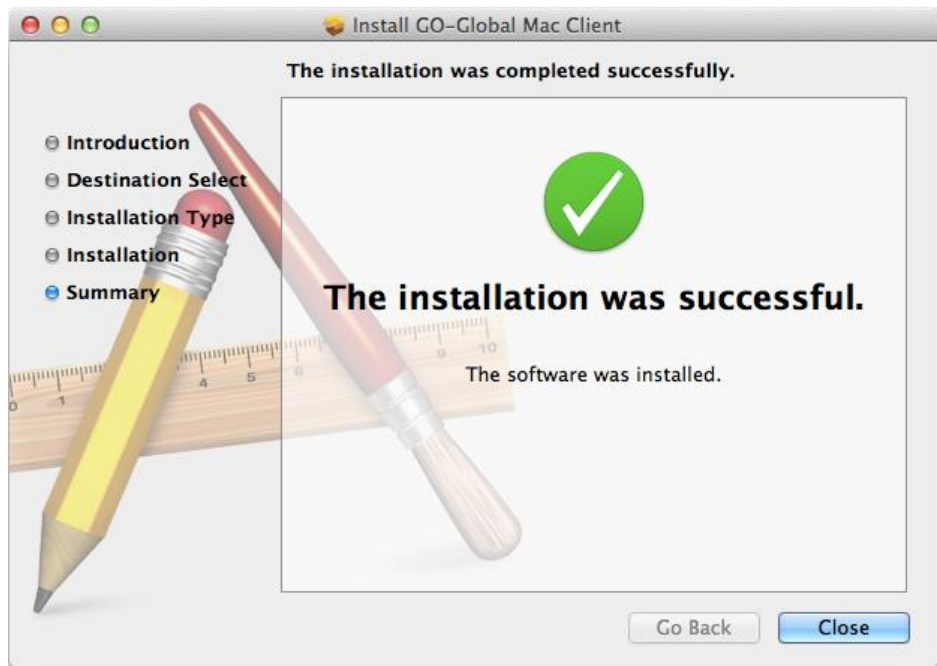
3. Click **gg-client.mac.pkg**. If a message is displayed stating that the file can't be opened then hold down the Control key, click the package and select **Open** from the displayed menu. An administrator password will be required (and user name if logged in as a non-administrator).



4. Click **Continue**.



5. Click **Close**.



The add-on will be installed and you are ready to use IMS Payroll Cloud.

Upgrading the Add-On

If you have an older version of the GO-Global Add-on for your browser a notification message will appear at the top of the screen. Do not log in to IMS Payroll Cloud until you have upgraded the add-in.



To upgrade, click on the notification message. This will take you to a screen containing a **Download** link—download and run the installer for your web browser in the same way as when you first installed it.

