

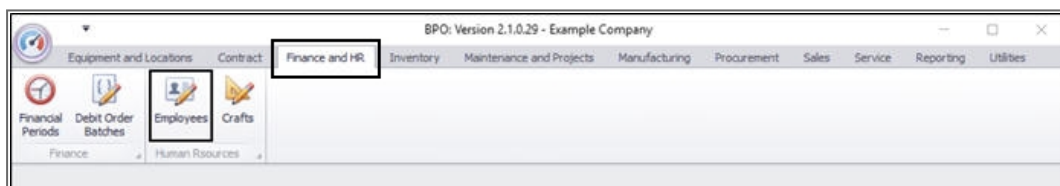
# HUMAN RESOURCES

## LINK A DEPARTMENT TO AN EMPLOYEE

It is vital to link a department to an employee and set up the department association - where the company is using a segmented chart of accounts, and one of the segments is based on the employee's department.

**Departments - employee association** must be configured in the configuration settings (this is the link that is required for the financial transactions to process to the correct segmented ledger accounts).

**Ribbon Access:** *Finance and HR > Employees*



- The **Employees** listing screen will be displayed.

## SELECT EMPLOYEE

- Select the **row** of the **employee** to whom you wish to link a **department**.
- Click on **Edit**.

Employees - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Save Layout Workspaces Reports Excel Refresh

Links

Enter text to search...

Drag a column header here to group by that column

IdEmployeeID	EmployeeNumber	FullName	EmailAddress	Manager
1	DUT001	Susan Du Toit	susan@email.co.za	CO3 Administrator
2	SHA001	Belinda Sharman		Susan Du Toit
3	HAR001	Chris Haynes Attendee		Susan Du Toit
4	BAL001	Susan Cooper	susan@noemail.com	Belinda Sharman
5	You001	Karlen Jessica Young Dun...		
6	RED001	George James Reddy Jef...		Chris Haynes Attendee
7	EMP123	Carolina Suzzetta Lourens...		Susan Du Toit
8	TWA001	Jonathan-Mark Twain-Sut...	jona@noemail.co.za	Belinda Sharman
9	STE001	Markus Arlius Stevenson ...	judith.mudzengi@co3.co.za	Jonathan-Mark Twain-Sutton-under-Whitestone
10	JOH001	Michael-Stark Johnson St...	mike@noemail.co.za	Markus Arlius Stevenson Rodenhizer Tomljenovi
13	CO3	CO3 Administrator	judith.mudzengi@co3.co.za	
15	TAD009	Theo Peterson	ted@noemail.co.za	Belinda Sharman
17	MUD001	Mark Mudderveld		Susan Du Toit
19	TIM	Joseph Timber		
20	BEN	Ben Johnson		
21	E147282	Jade Rivers		
22	E987654	Jeff Rivers		Jade Rivers
23	JOE001	Joel James	joel@noemail.com	Susan Du Toit
24	MIL001	Sarah Milder		

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details


Loans

Organisation Chart

### **SELECT DEPARTMENT**

---

- The ***Edit Employee*** screen will open.
- Click on the search icon in the ***Department*** field.



Home

Equipment and Locations

Contract

Finance and HR

Inventory

Maintenance and Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save

Back

Save Layout

Workspaces

Processing

Format

Enter text to search...

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Organisation Chart

Employee Number

TAD009

First Name

Theo

Second Name

Peter

Initials

TJ

Last Name

Peterson

ID Number

771106300026087

Birth Date

06 Nov 1978

Phone Number (W)

031 258 1425

Extension(W)

198

Phone Number (H)

031 654 1234

Fax Number

031 789 1414

Mobile Number

083 258 1425

Email Address

ted@noemail.co.za

Passport Number

1593574862

Marital Status

Single

Manager

Belinda Sharman

Department

Technical

User ID

BPOSysAdmin

Bank Name

Nedbank

Account Name

Mr T P Peterson

Account Number

0987654321

Default Account

☐

Physical Address

26 River Road

Forest Hills

North Suburb

City

Durban

Province

KwaZulu Natal

Postal Code

1234

Country

South Africa

Postal Address

City

Province

Postal Code

Country

Branch Name

Forest Hill

Branch Code

202020

Account Type

Savings Account

Dependants

Drag a column header here to give it a default value

First Name	Middle Name	Last Name

Shifts

Drag a column header here to give it a default value

Start Date	Shift Name	Start Day

Crafts

Drag a column header here to give it a default value

Craft Name	Craft Desc	Site Desc
ADMN	Administration	Durban
DES	Design	Durban

- The ***Select the Department*** screen will open.
- Select the ***row*** of the Department you wish to link to this employee.
- Click on ***Ok***.

Edit Employee - BPO: Version 2.1.0.29 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Save Layout Workspaces

Processing Format

Links

Enter text to search...

Addresses

Overtime and Holidays

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Organisation Chart

Select the Department

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

DEPTDepartment	DEPTDepartmentDescription	Status
Sales	Sales Department	A
Tech	Technical	A

Department: Technical

User ID: BPOSysAdmin

Bank Name: Nedbank

Account Name: Mr T P Peterson

Account Number: 0987654321

Default Account: ☐

Branch Name: Forest Hill

Branch Code: 202020

Account Type: Savings Account

Dependants

Drag a column header here to group by that column

Firstname	Middlename	LastN

Shifts

Drag a column header here to group by that column

StartDate	ShiftName	StartDay

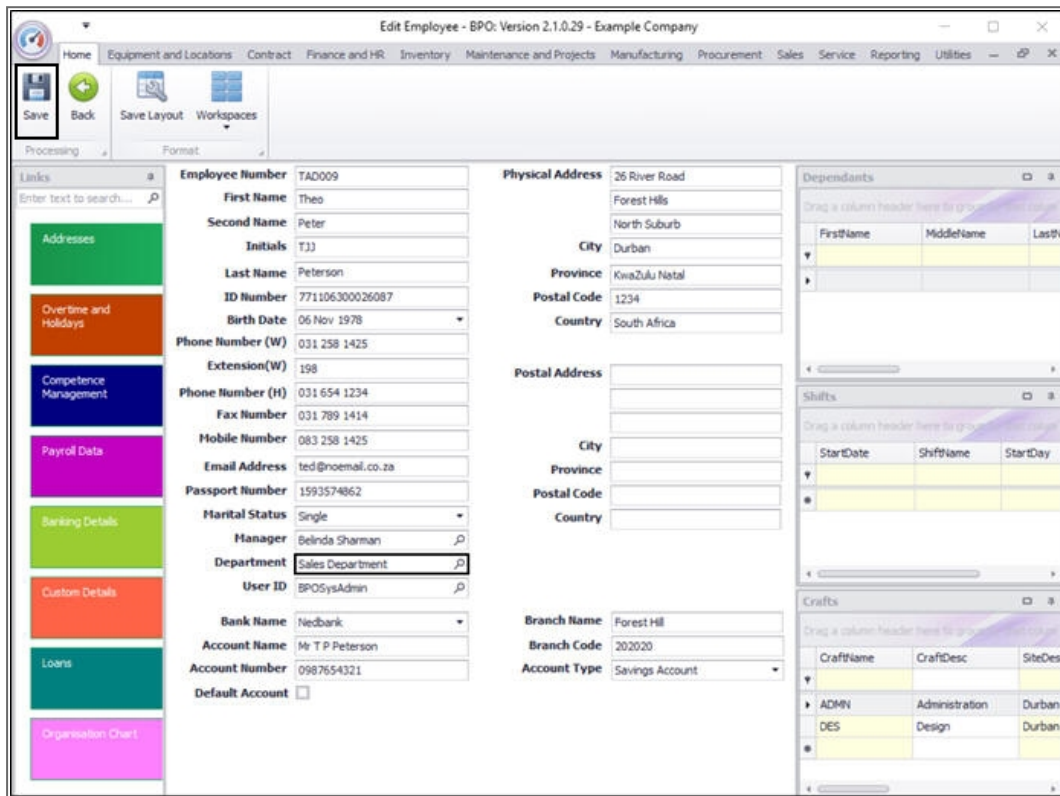
Crafts

Drag a column header here to group by that column

CraftName	CraftDesc	SiteDes
ADMIN	Administration	Durban
DES	Design	Durban

## SAVE LINKED DEPARTMENT

- The selected department will now populate the **Department** field.
- **Save** the changes.



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