

# **HUMAN RESOURCES**

# **EMPLOYEES - EDIT EMPLOYEE**

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

▼ BPO: Version 2.4.0.11 - Example Company _ □ □												
Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utility	es											
ncial Debit O'der Bathers Bathers												
Finance / Human Resources /	\$											

- 1. The *Employees* listing screen will open.
  - <u>All</u> the employee currently set up on the system can be viewed here.
- 2. Scroll through the list or
- 3. Use the <u>filter row</u> to find a particular employee.

## **SELECT EMPLOYEE**

- 4. Select the *row* of the employee where you wish to make changes .
- 5. Click on *Edit*.



#### Edit Employee

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Home Equipment	nt / Locations Contra	act Finance / HR. Ir	nventory Maintenance / Projects Man	ufacturing Procur	ement Sale	s Service	Reporting L	Itilities	- 6	9
dd Edit Delete Vie	ew Save Layout W	iorkspaces	xport Refresh Print							
ks A	Drag a column header h	nere to group by that colur	nn					//		
er text to search P	EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status	
	<b>9</b> 8 <b>0</b> 0	R B C	-B:	R B C	88C	* <b>0</b> 0	R C	RBC	REC	1
Addresses	DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A	1
	SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A	
O	HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A	
Overtime and Holidays	BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
	You001	Karlien Jessica You	Karlien Jessica@TEST ALPHA v2.4.0.0 DB						Α	
	RED001	George James Red	George James@TEST ALPHA v2.4.0.0 DB	Wesley Haynes					Α	
Competence Management	EMP 123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					A	
rionagement	DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
	STE001	Markus Arilius Stev	Markus Arilius@TEST ALPHA v2.4.0.0 DB	John Twain					A	
Payroll Data	JOH001	Michael-Stark Johns	Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					A	
	CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A	
	TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	A	
Banking Details	MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
	TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A	- '
4	BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567		2 -	A	
Custom Details	E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A	
	E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						Α	
	MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				Α	
	DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						Α	
Loans	DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						Α	
	DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						Α	
	DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A	
	THO001	Mary Thompson	MORE ALDER US 4 0 0 DR 40 75	Polinda Charman						д.,

1. The *Edit Employee* screen will open.

# **EDIT EMPLOYEE INFORMATION**

You can make changes to the following information:

- 2. The **Employee Details** frame.
  - To <u>update</u> details, highlight the current text in the relevant field, then type in the amended information.
  - To <u>remove</u> details, highlight the text and press delete on your keyboard.
- Refer to the links for selecting and editing a <u>Manager</u>, <u>Department</u> or User ID.
- 4. The **Dependants** panel
  - Click on the <u>Dependants</u> link for a detailed process of how to edit the information in this frame.
- 5. The Shifts panel



- Click on the <u>Shifts</u> link for a detailed process of how to edit the information in this frame.
- 6. The Crafts panel
  - Click on the <u>Crafts</u> link for a detailed process of how to edit the information in this frame.

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Home Equipme	nt / Locations Contr	act Finance / HR Inventor	y Maintenance / Projec	ts Manufacturing	Procurement	Sales	Service	Reporting	Utilities			-	8 X
Save Back Save Layout	Workspaces		2										\$
Links #	Employee Number	MUD001	* Physical Address	1 Main House	De	pendants							
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	Second Name			Main Town		Eircthiama	Middeliama	Lacthiamo	tONumber 5	irthData	Relation	IcDependen	
Addresses	Initials	3	• City	Main City	9	n isovanie ni:	Induename	allo	RDC C	=	n II.	ISDependan In:	
	Last Name	Mudzengi	* Province	Main Province		Chervl	Grace	Mudzengi	1111111 0	1/02/2019	Child Dependant	Yes	
	ID Number	1122334455	Postal Code	MAIN									
Holidays	Birth Date	05/04/2005 -	Country	South Africa									_
	Phone Number (W)	123 456 7890											
Competence	Extension(W)		Postal Address		Sh	ifts	6						<b>Д</b>
Management	Phone Number (H)	987 654 3210			Dr		header here t						1
	Fax Number					StartDate	▲ Shit	tName	StartDay	StartDateK	ev l		1
Payroll Data	Mobile Number	0102030405	City		Ŷ	-	8 <b>0</b> 0		=	-			
	Email Address	Judith@TEST ALPHA v2.4.0.0 DB	Province			01/01/2020	Nor	mal Week		1	12		
	Passport Number		Postal Code		*								
Banking Details	Marital Status	Married 💌	Country										
	Manager	Bianca Du Toit 🔎				afte							
	Department	Sales Department P	3		C.		6						
Custom Details	User ID	JudithM ,O	1		Or	ag a column	neader here t	o group by the	it column				1.1
	Bank Name	ABSA Bank 👻	Branch Name	Kingston		CrattName	CrattDesc	SiteDescri	ption AccountCo	de COSAccO	de CostEstimate	Rate	IsPrimary
	Account Name	Mrs J Mudzengi	Branch Code	001002	- i i	ADAM	Administrati	n Durban	1100	2100	150.00	- 250.00	Yes
Loans	Account Number	10203040	Account Type	Current Account		TECH	Technician	Durban	1100	2100	1,000,00	1.000.00	No
	Default Account	$\checkmark$			*		- Construction	ourour	.100	2.00	1,000.0		
					-								

# **SAVE CHANGES**

- 1. When you have made the required changes;
  - In this example, a <u>new dependant</u> has been added,
- 2. Click on Save.



## Edit Employee

			Edit Employee - B	PO: Version 2.5.0.0 - Exampl	e Company v2	5.0.0					_	
Home Equipme	ent / Locations Contr	act Finance / HR Inventor	y Maintenance / Projec	ts Manufacturing Procu	rement Sale	s Service	Reporting	Utilities			-	8 X
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Addresses	Initials	1	<ul> <li>City</li> </ul>	Main City	P +0:	10:	a B c	n <b>0</b> c =	- 4	¢.	10:	
	Last Name	Mudzengi	<ul> <li>Province</li> </ul>	Main Province	Cheryl	Grace	Mudzengi	1111111 0	1/02/2019 C	nild Dependant	Yes	
Overtime and	ID Number	1122334455	Postal Code	MA1N	John	James	Mudzengi	2222222 0	1/01/2021 C	nild Dependant	Yes	
Holidays	Birth Date	05/04/2005 -	Country	South Africa	*							
	Phone Number (W)	123 456 7890		1								
Competence	Extension(W)		Postal Address		Shifts							Д.
Management	Phone Number (H)	987 654 3210			Drag a colum							
	Fax Number				StartDate	S	hiftName	StartDay	StartDateKe			-
Payroll Data	Mobile Number	0102030405	City		۹ =	R	6 c	-	-			
	Email Address	Judith@TEST ALPHA v2.4.0.0 DB	Province		01/01/20	20 N	ormal Week		1 1	2		
	Passport Number		Postal Code		*							
Banking Details	Marital Status	Married •	Country		_							
	Manager	Bianca Du Toit 🔎			Crafts							4
	Department	Sales Department			Dran a colum							
Custom Details	User ID	JudithM D			Gradeling	CardOran	Cit-Dave	ation Association	- COSAC	- CastEstimate	Data	LaDaimann
	Bank Name	ABSA Bank 🔹	Branch Name	Kingston	e elle	e crantDesc	. siteDescr	ACCOUNTLOO	allic	= Cosicstmate	=	allo
	Account Name	Mrs J Mudzengi	Branch Code	001002	+ ADMN	Administra	ation Durban	1100	2100	150.00	350.00	Yes
Loans	Account Number	10203040	Account Type	Current Account	TECH	Technician	Durban	1100	2100	1,000.00	1,000.00	No
	Default Account	$\checkmark$			*							

- 1. A message box will pop up informing you;
  - Employee: [] has been saved.
- 2. Click on *OK*.

ф <del>т</del>			Edit Employee - B	PO: Version 2.5.0.0 - Example	Comp	any v2.5	.0.0					_	
Home Equipme	nt / Locations Contr	act Finance / HR Inventor	Maintenance / Project	ts Manufacturing Procure	ement	Sales	Service	Reporting	Utilities			-	Ъх
Save Back Save Layout	t Workspaces												\$
Links #	Employee Number	MUD001	<ul> <li>Physical Address</li> </ul>	1 Main House	Dep	endants							ņ
Enter text to search P	First Name Judith Main Street												
	Second Name			Main Town			neader nere to	group by the	TOblashes 1	District on the	Deletter	t-Deserved as	/ /
Addresses	Initials	3	• City	Main City		nsuvame D:	induleivame	alle	affr	=	in the second se	isDependar	10
	Last Name	Mudzengi	Province	Main Province	6	hervl	Grace	Mudzenoi	111111	01/02/2019	Child Dependant	Yes	-
	ID Number	1122334455	Postal Code	MAIN	1	lohn .	James	Mudzengi	2222222	01/01/2021	Child Dependant	Yes	
Holidays	Birth Date	05/04/2005 🔹	Country	South Africa	*								
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	Email Address	Judith@TEST ALPHA v2.4.0.0 DB			0	1/01/2020	) Norn	al Week		1	12		
	Passport Number				*								
Banking Details	Marital Status	Married 👻	Country		1								
	Manager	Bianca Du Toit 🔎				0							
	Department	Sales Department 🖉 🖉			Crat	nts							4
Custom Details	User ID	JudithM ,P			Drag								
	Bank Name	ABSA Bank 🔹	Branch Name	Kingston	- 0	CraftName	CraftDesc	SiteDescr	ption AccountCo	de COSAccO	ode CostEstimate	Rate	IsPrimary
	Account Name	Mrs J Mudzengi	Branch Code	001002	• •	0:	8 <b>0</b> :	FOC	10:	4 EC	=	=	a 🛛 C
Loans	Account Number	10203040	Account Type	Current Account	• A	IDMN	Administratio	n Durban	1100	2100	150.00	350.00	Yes
	Default Account	$\checkmark$				ECH	recnnician	Durban	1100	2100	1,000.00	1,000.00	NO
					-								
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The edited details will be *saved* and you will return to the *Employee*s listing screen.

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