# HUMAN RESOURCES

## INTRODUCTION TO EMPLOYEES

It is important to understand the difference between **Employees** and **Users**.

An **employee** is a person for whom your company is collecting and processing data. Each **employee** within the company is loaded onto the system as an **Employee**, with their details.  These details would relate to what the company needs to know about its employees and can include the following:

- Personal Details, e.g. Phone Number and Email Address
- Payroll details
- Licenses and Training Details
- Craft Details (Skill or Job Title)
- Time and attendance details.

By loading your employees correctly, you will be able to keep track of employee shifts and availability and ultimately manage your human resources more efficiently.
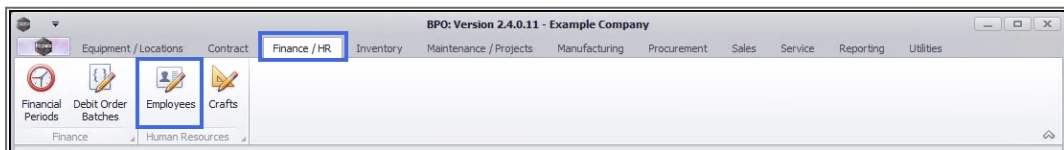
A **User** is a person who requires *access to the system* and therefore require a *user login* and *password*.

When setting up your Human Resources module, it would be helpful to gather a list of your employees with their details. Reviewing the following topic, will give you a good idea of what type of information is required.

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

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## EMPLOYEES LISTING SCREEN

1.  The *Employees* listing screen will be displayed.
2.  Here you can view a list of <u>all</u> the employees currently set up on the system.

## EMPLOYEES RIBBON ACTION BUTTONS

3.  From this screen, you can <u>Add</u>, <u>Edit</u>, <u>Delete</u> and <u>View</u> an employee.
4.  This screen supports the <u>Save Layout</u> and <u>Workspaces</u> functionality.
5.  Employee <u>Reports</u> can be viewed here and the employees data grid information can be <u>Exported</u> to an Excel file.
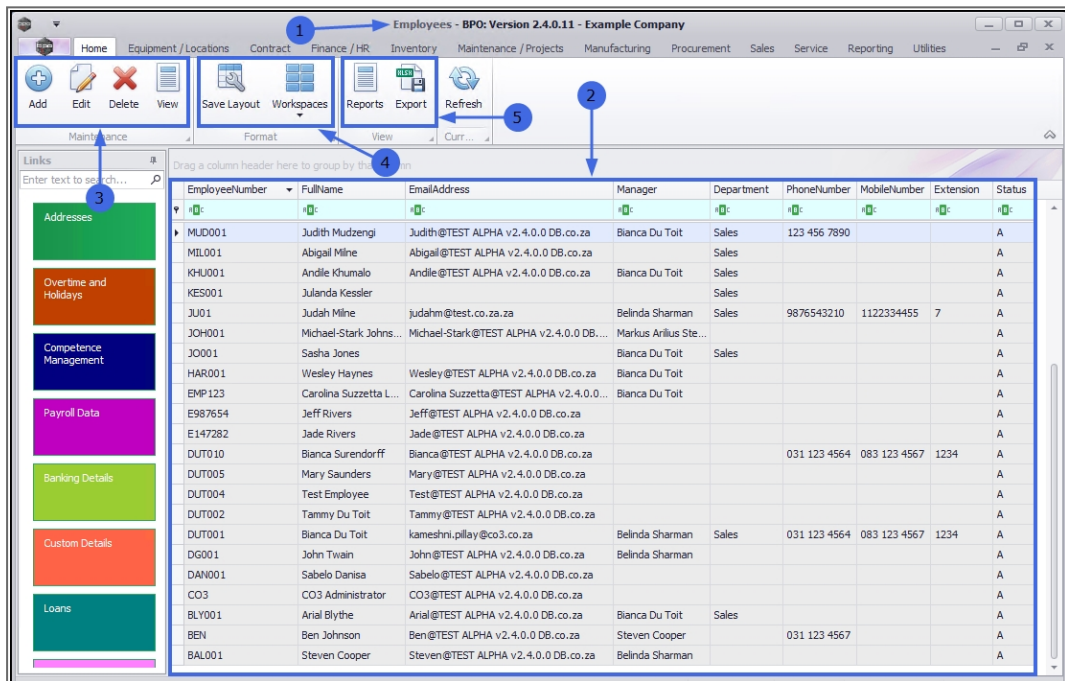


## THE FUNCTION TILES

On the left side of the Employees listing screen is the *Links* panel which contains the Employee *Functions* tiles. Each tile, when clicked on, will take you to further information concerning the selected employee.

**Important Note**: When working with these tiles, ensure that you have selected the correct employee <u>before</u> you click on any tile.

Clicking on the link within each Tile explanation will redirect you to a detailed handling of that particular Topic.

i. **Addresses**: This tile will direct you to the <u>Address List for: []</u> screen where you can **Add**, **Edit**, **Delete** and **View** addresses linked to the selected employee.

ii. **Overtime and Holidays**: This tile will direct you to the <u>Availability Exceptions for: []</u> screen where you can **Add**, **Edit** and **Delete** availability exceptions linked to the selected employee.

iii. **Competence Management**: This tile will direct you to the <u>Employee Training Courses for: []</u> screen where you can **Add**, **Edit** and **Delete** qualifications or training courses linked to the selected employee.

iv. **Payroll Data**: This tile will direct you to the <u>Payroll Data for: []</u> screen where you can **Save** payroll details linked to the selected employee.

v. **Banking Details**: This tile will direct you to the <u>Banking Details for: []</u> screen where you can **Add**, **Edit**, **Delete** and **View** addresses linked to the selected employee.

vi. **Custom Details**: This tile will direct you to the <u>Custom Details for: []</u> screen where you can **link** additional information to the selected employee.

vii. **Loans**: This tile will direct you to the <u>Loans for: []</u> screen where you can **view** loan information linked to the selected employee.
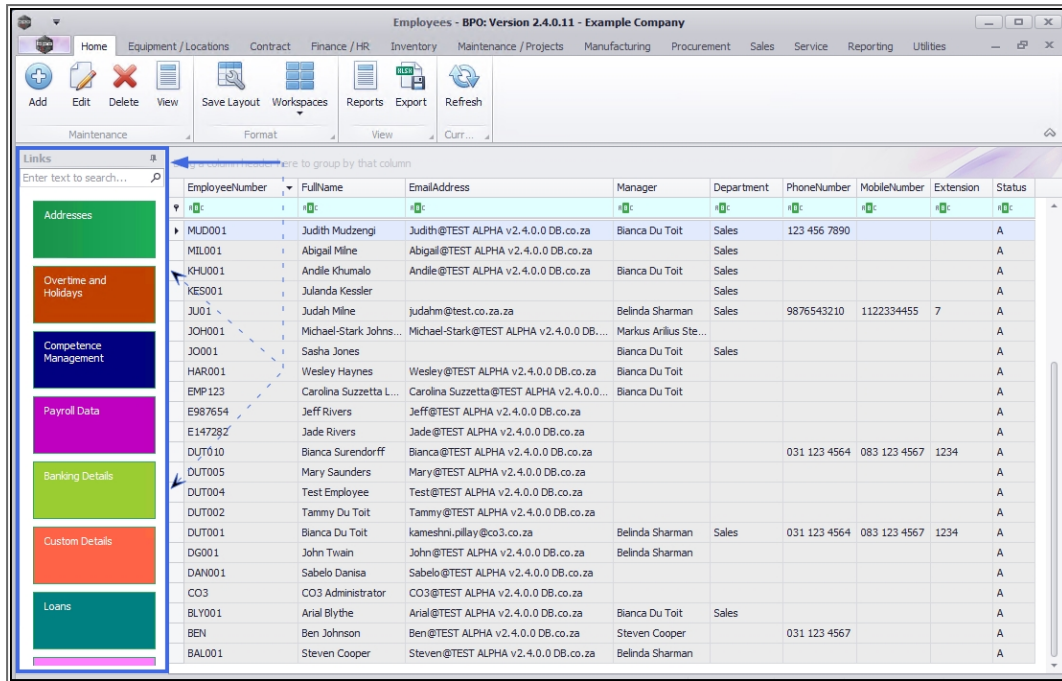
viii.  **Organisation Chart**: This tile will direct you to the <u>Organisational Chart</u> screen which gives you a visual representation of the company's reporting relationships in a hierarchical structure.

ix.  **Documents**: This tile will direct you to the <u>Documents for Employee - []</u> where you can **Add**, **Edit**, **Delete** and **View** digital documents linked to the selected employee.

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