

# 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.

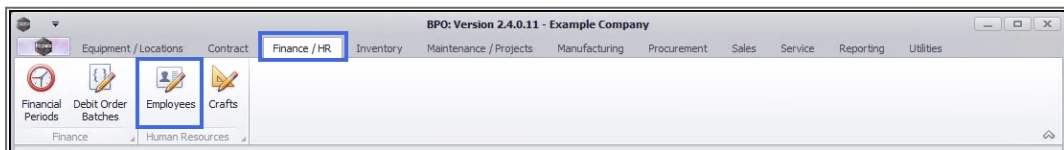
A **User** is a person who requires **access to the system** and therefore require a **user login** and **password**.

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.

---

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

---

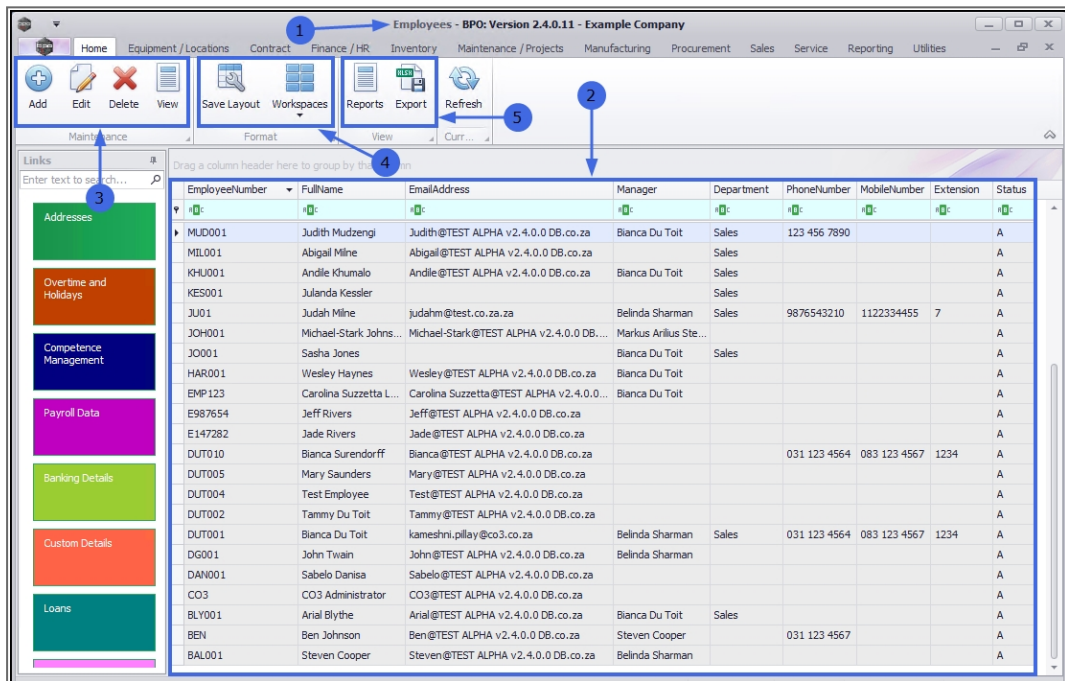


## EMPLOYEES LISTING SCREEN

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

## EMPLOYEES RIBBON ACTION BUTTONS

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



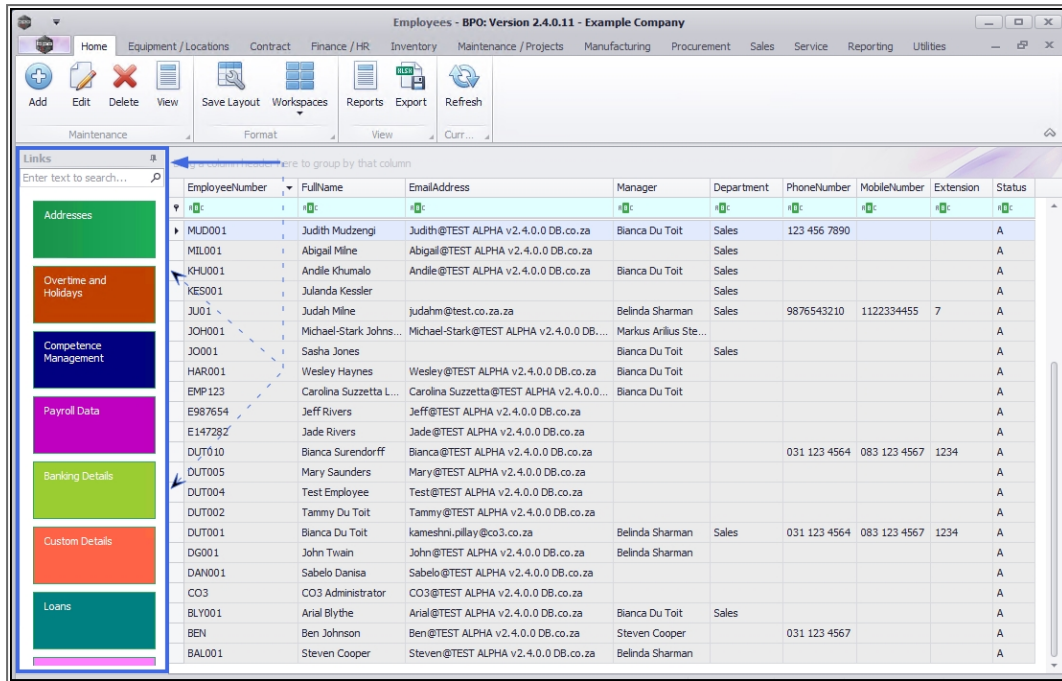
## THE FUNCTION TILES

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 before 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 [Address List for: \[\]](#) 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 [Availability Exceptions for: \[\]](#) 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 [Employee Training Courses for: \[\]](#) 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 [Payroll Data for: \[\]](#) screen where you can **Save** payroll details linked to the selected employee.
- v. **Banking Details:** This tile will direct you to the [Banking Details for: \[\]](#) 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 [Custom Details for: \[\]](#) screen where you can **link** additional information to the selected employee.
- vii. **Loans:** This tile will direct you to the [Loans for: \[\]](#) screen where you can **view** loan information linked to the selected employee.



viii. **Organisation Chart:** This tile will direct you to the [Organisational Chart](#) 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 [Documents for Employee - \[\]](#) where you can **Add, Edit, Delete** and **View** digital documents linked to the selected employee.

Employees - BPO: Version 2.4.0.11 - Example Company

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

Add | Edit | Delete | View | Save Layout | Workspaces | Reports | Export | Refresh

Maintenance | Format | View | Curr...

Links

Enter text to search...

Drag a column header here to group by that column

EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status
MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A
MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A
KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A
KES001	Julanda Kessler			Sales				A
JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A
JOH001	Michael-Stark Johns...	Michael-Stark@TEST ALPHA v2.4.0.0 DB...	Markus Arillus Ste...					A
JO001	Sasha Jones		Bianca Du Toit	Sales				A
HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
EMP123	Carolina Suzzetta L...	Carolina Suzzetta@TEST ALPHA v2.4.0.0...	Bianca Du Toit					A
E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A
E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A
DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A
DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A
DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						A
CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A
BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A
BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A
BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Organisation Chart

Documents

BPO.MNU.021

