

# HUMAN RESOURCES

## LINK A CRAFT TO AN EMPLOYEE

Employees must be set up with at least one **primary** craft type/skill per branch that the employee is linked to.

**More than one craft** can be assigned per branch but **only one** of those crafts can be set as the primary craft.

Cost and charge rates can be set up per craft.

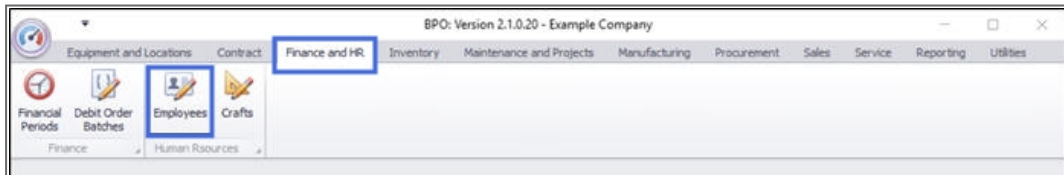
Assigning crafts to employees ensures that you can plan resources required for upcoming work.

In the **Edit Employee** screen, the **Crafts** docking panel lists all the **crafts** (skills) linked to the selected employee.

---

**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 assign a craft.
- Click on **Edit**.

Employees - BPO: Version 2.1.0.20 - 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...

EmployeeID	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.mudzeng@co3.co.za	Jonathan-Mark Twain-Sutton-under-Whitestone
10	JOH001	Michael-Stark Johnson St...	mike@noemail.co.za	Markus Arlius Stevenson Roderhizer Tomljenovi
13	CO3	CO3 Administrator	judith.mudzeng@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		
25	Jam001	Ted Jackson	ted.jackson@noemail.co.za	

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

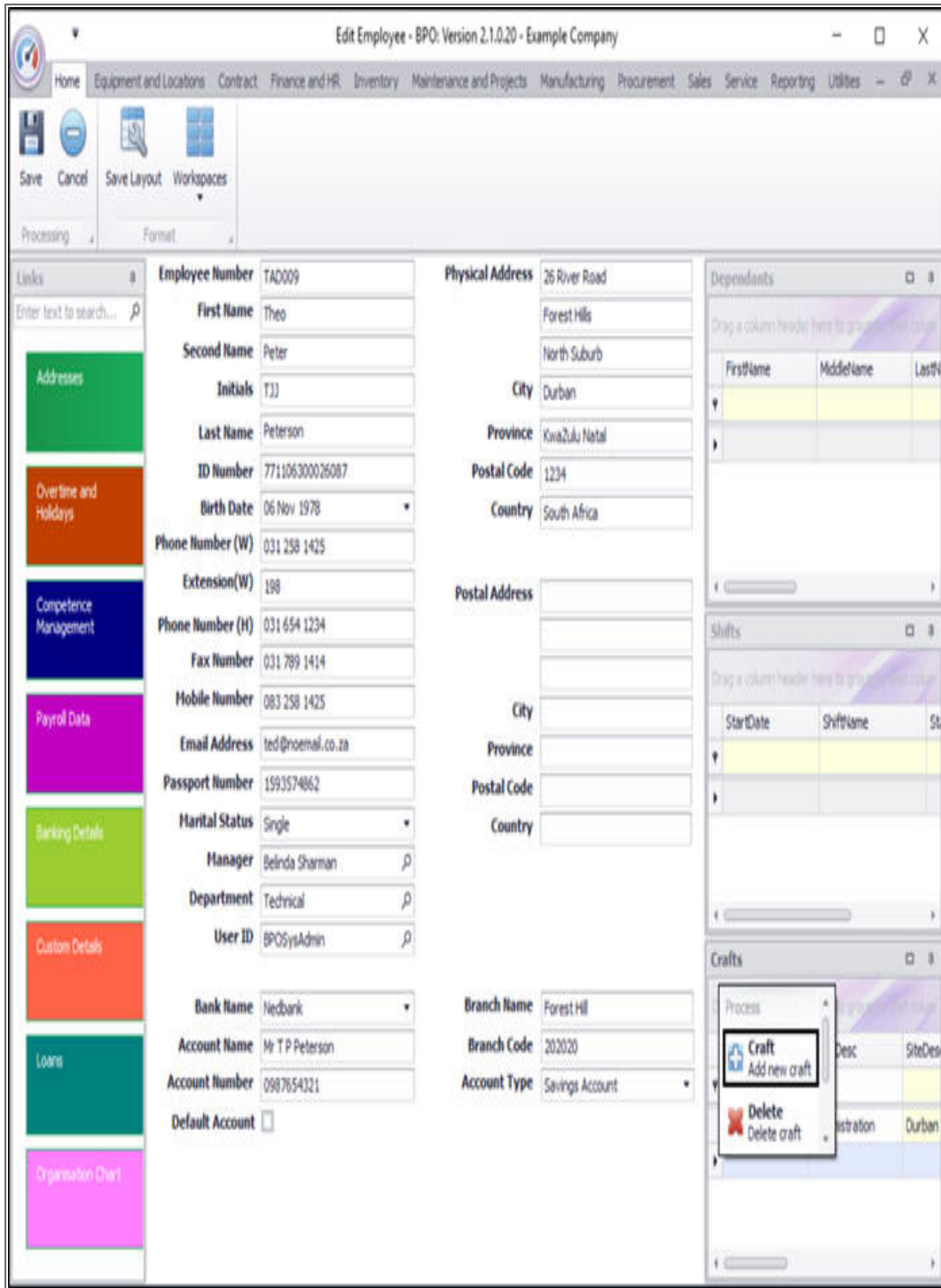
Organisation Chart

The **Edit Employee** screen will open.

## SELECT CRAFT TO ASSIGN

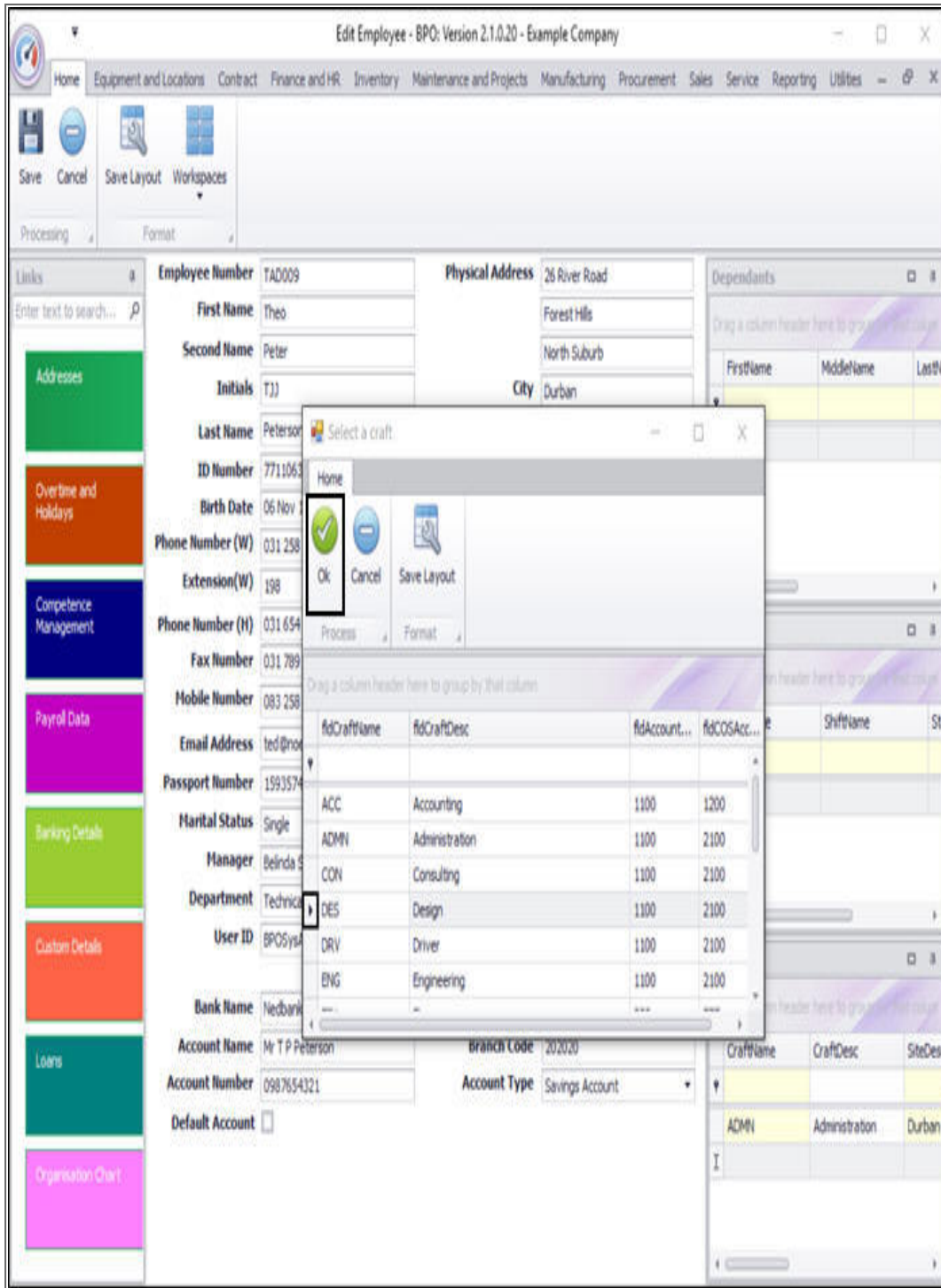
---

- In the **Crafts** docking panel, **right-click** anywhere, in any row (except the filter row).
- A **Process** menu will pop up. Click on **Craft** - Add new craft.



The **Select a craft** pop up screen will appear.

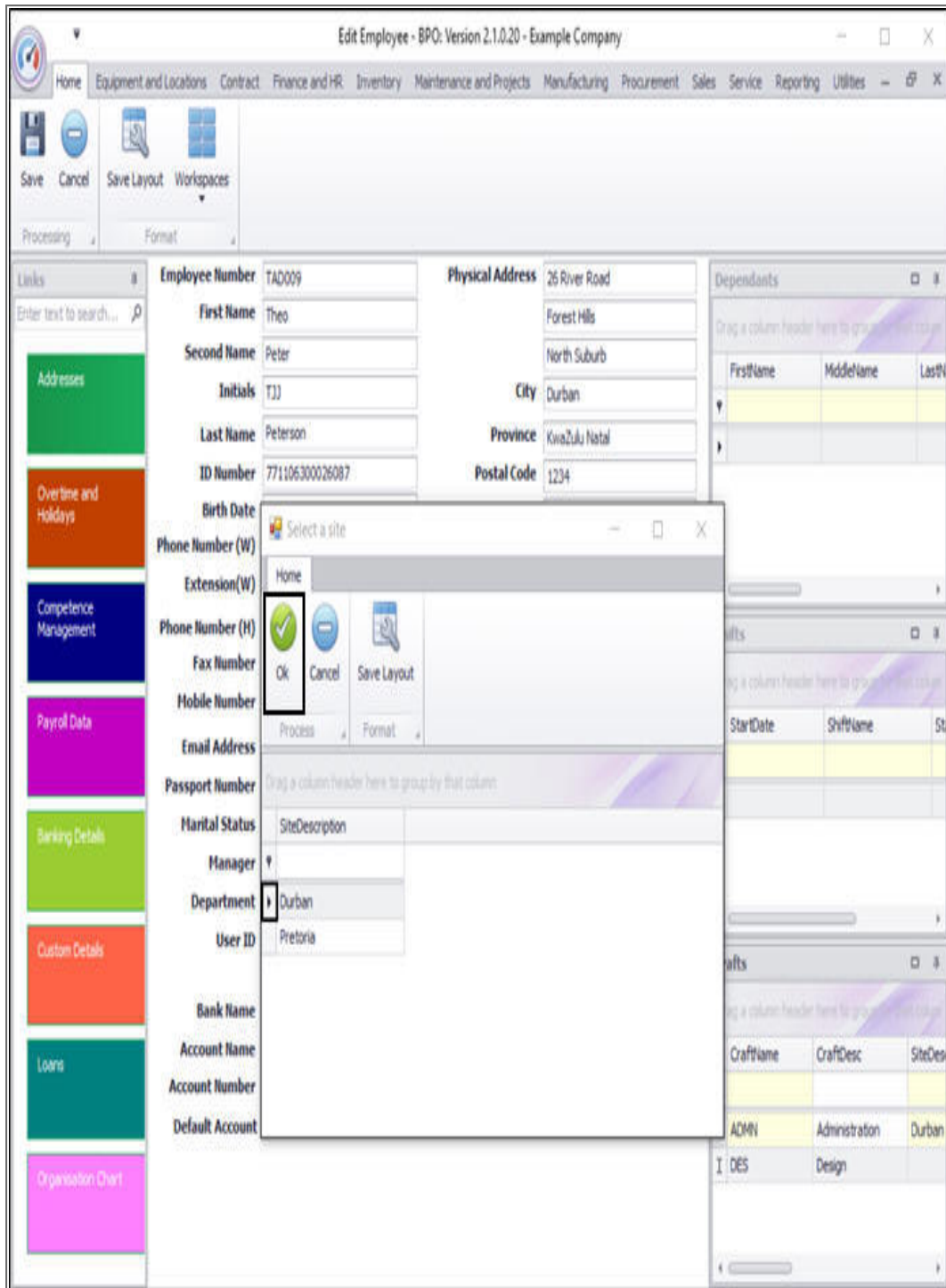
- Select the **row** of the craft that you wish to assign to this employee.
- In this image **Des** Design has been selected.
- Click on **Ok**.



## ASSIGN CRAFT TO A SITE

The *Select a site* pop up screen will appear.

- Select the **row** of the site you wish to allocate to this employee craft.
- Click on **Ok**.



- In the **Craft** docking panel you can see that the **Craft Name**, **Craft Description** and **Site Description** columns have now been populated.

The screenshot displays the 'Edit Employee' form with the following data:

Employee Number	TAD009
First Name	Theo
Second Name	Peter
Initials	TP
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	<input type="checkbox"/>

Physical Address: 26 River Road, Forest Hills, North Suburb, Durban, KwaZulu Natal, 1234, South Africa.

Postal Address: (Empty)

Branch Name: Forest Hill, Branch Code: 202020, Account Type: Savings Account.

**Crafts Table:**

CraftName	CraftDesc	SiteDescription
ADMN	Administration	Durban
DES	Design	Durban



- Scroll right in the **Craft** docking panel until you can see the **Cost Estimate, Rate** and **IsPrimary** columns.

The screenshot shows the 'Edit Employee' window for 'Example Company'. The interface includes a menu bar, a toolbar with 'Save', 'Cancel', 'Save Layout', and 'Workspaces', and a main data entry area. On the left, there is a 'Links' sidebar with categories like 'Addresses', 'Overtime and Holidays', 'Competence Management', 'Payroll Data', 'Banking Details', 'Custom Details', 'Loans', and 'Organisation Chart'. The main area is divided into several sections:

- Employee Information:** Fields for 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), and User ID (BPOSysAdmin).
- Physical Address:** Fields for 26 River Road, Forest Hills, North Suburb, Durban, KwaZulu Natal, 1234, and South Africa.
- Postal Address:** Empty fields for City, Province, Postal Code, and Country.
- Banking Details:** Fields for Bank Name (Nedbank), Branch Name (Forest Hill), Branch Code (202020), Account Name (Mr T P Peterson), Account Number (0987654321), and Account Type (Savings Account).
- Dependants:** A table with columns for First Name, Middle Name, and Last Name.
- Shifts:** A table with columns for Start Date, Shift Name, and Start Time.
- Crafts:** A table with columns for Cost Estimate, Rate, and Is Primary. The first row shows a Cost Estimate of 150.00, a Rate of 450.00, and Is Primary set to Yes. The second row shows a Cost Estimate of 0.00, a Rate of 0.00, and Is Primary set to No.

## **CRAFT COST ESTIMATE**

---

Type in the current cost estimate for this craft.

## **CRAFT RATE**

---

Type in the current rate for this craft.

## **ISPRIMARY CRAFT**

---

Each employee can only have one *primary* craft per branch. If this is an additional craft, then you should choose **No** from the drop-down menu in this column.

Edit Employee - BPO: Version 2.1.0.20 - Example Company

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

Save | Cancel | Save Layout | Workspaces

Processing | Format

Links

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** TJJ

**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 Sherman

**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**

Firstname	MiddleName	LastN

**Shifts**

StartDate	ShiftName	St

**Crafts**

CostEstimate	Rate	IsPrimary
150.00	450.00	Yes
300.00	900.00	No
		Yes
		No

## SAVE ASSIGNED CRAFT

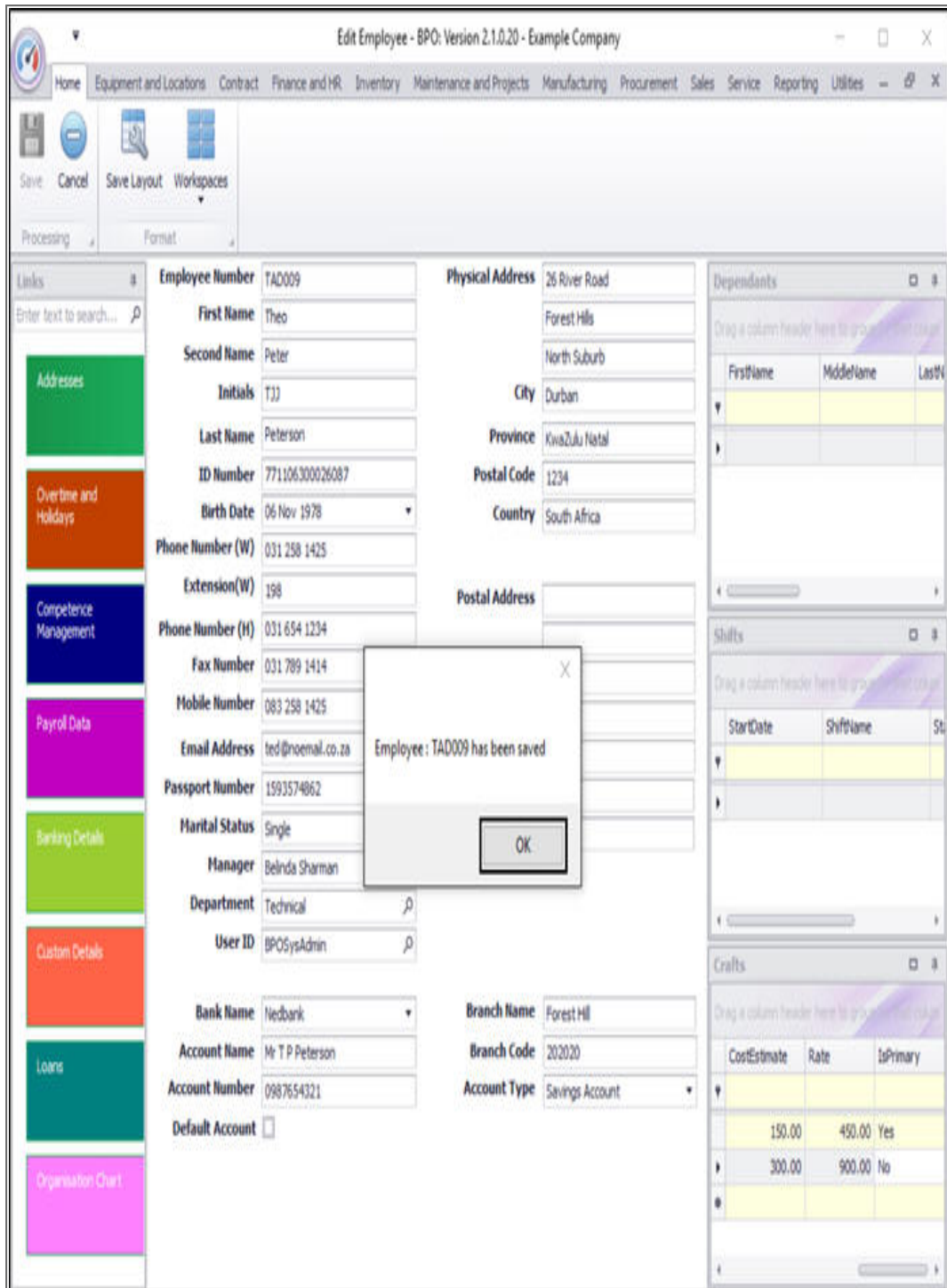
- When you have finished adding the craft details, Click on **Save**.

The screenshot shows the 'Edit Employee' window for 'Example Company'. The interface includes a menu bar, a toolbar with 'Save', 'Cancel', 'Save Layout', and 'Workspaces', and a sidebar with navigation options like 'Addresses', 'Overtime and Holidays', 'Competence Management', 'Payroll Data', 'Banking Details', 'Custom Details', 'Loans', and 'Organisation Chart'.

The main data entry area is divided into several sections:

- Employee Information:** 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), and User ID (BPOSysAdmin).
- Physical Address:** 26 River Road, Forest Hills, North Suburb, Durban, KwaZulu Natal, 1234, South Africa.
- Postal Address:** (Empty fields for City, Province, Postal Code, and Country).
- Banking Details:** Bank Name (Nedbank), Branch Name (Forest Hill), Branch Code (202020), Account Name (Mr T P Peterson), Account Number (0987654321), and Default Account (unchecked).
- Dependants:** A table with columns for First Name, Middle Name, and Last Name.
- Shifts:** A table with columns for Start Date, Shift Name, and Start Time.
- Crafts:** A table with columns for Cost Estimate, Rate, and Is Primary. It shows two entries: one with a cost estimate of 150.00 and rate of 450.00 (Is Primary: Yes), and another with a cost estimate of 300.00 and rate of 900.00 (Is Primary: No).

- A message box will pop up advising the following:
  - *Employee: [ ] has been saved.*
- Click on **Ok**.



- You will return to the **Employees** listing screen.

Employees - BPO: Version 2.1.0.20 - 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...

fdEmployeeID	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 Roderhizer 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	XOE001	Joel James	joel@noemail.com	Susan Du Toit
24	MIL001	Sarah Milder		
25	Jam001	Ted Jackson	ted.jackson@noemail.co.za	

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Organisation Chart

MNU.021.002