

HUMAN RESOURCES

VIEW, ADD, EDIT, DELETE SHIFTS

Setting up shifts is important for [workload scheduling](#) and [SLA Monitoring](#).

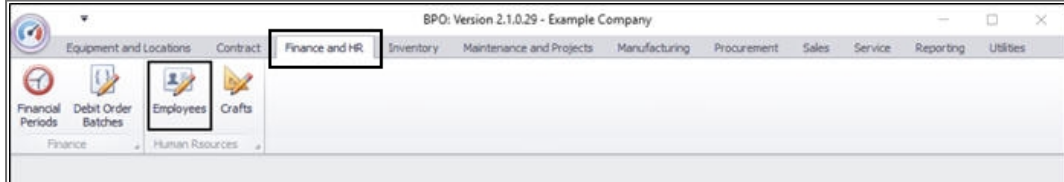
1 normal work week shift is required for technicians and SLA monitoring.

Additional shifts can be added for customers that have different trading hours, and subsequently linked to the relevant employee(s).

Normally, shifts will have **7** days (for a standard week).

The **Shifts** docking panel lists all the shifts assigned to the *selected* employee.

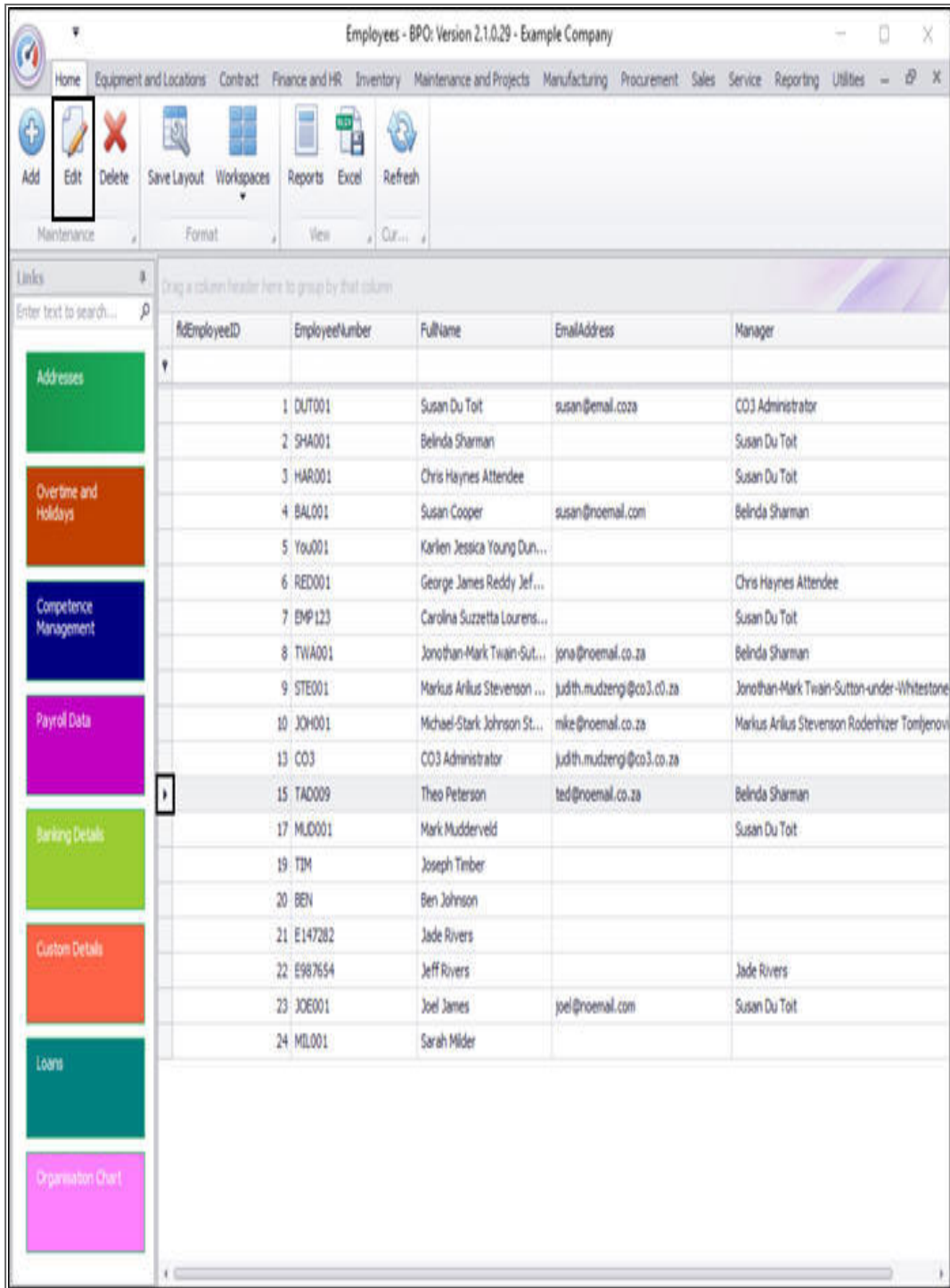
Ribbon Access: *Finance and HR > Employees*



The **Employees** listing screen will open.

SELECT EMPLOYEE

- Click on the **row selector** in front of the **employee** you wish to assign a shift to.
- Click on **Edit**.



The **Edit Employee** screen will be displayed.

THE SHIFTS PANEL

- The **Shifts** docking panel is on the right-hand side of this screen.

The screenshot shows the 'Edit Employee' window for 'Example Company'. The interface includes a menu bar, a toolbar with 'Save', 'Back', 'Save Layout', and 'Workspaces', and a 'Processing' status bar. The main area is divided into several sections:

- Links:** A sidebar on the left with buttons for 'Addresses', 'Overtime and Holidays', 'Competence Management', 'Payroll Data', 'Banking Details', 'Custom Details', 'Loans', and 'Organisation Chart'.
- Employee Information:** Fields for 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@noemal.co.za), Passport Number (1593574862), Marital Status (Single), Manager (Belinda Sharman), Department (Technical), and User ID (BPOSysAdmin).
- Banking Information:** Fields for Bank Name (Nedbank), Account Name (My T P Peterson), Account Number (0987654321), and a 'Default Account' checkbox.
- Physical Address:** Fields for 26 River Road, Forest Hills, North Suburb, City (Durban), Province (KwaZulu Natal), Postal Code (1234), and Country (South Africa).
- Postal Address:** Empty fields for City, Province, Postal Code, and Country.
- Branch Information:** Fields for Branch Name (Forest Hill), Branch Code (202020), 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 Day. It is currently empty.
- Crafts:** A table with columns for Craft Name, Craft Desc, and Site Des. It contains two entries:

CraftName	CraftDesc	SiteDes
ADMN	Administration	Durban
DES	Design	Durban

- Right click in any row (except the filter row) to display a pop-up **Process** menu.
- Click on **Shift** - Add new shift.

The screenshot displays the 'Edit Employee' interface. The main form is divided into several sections:

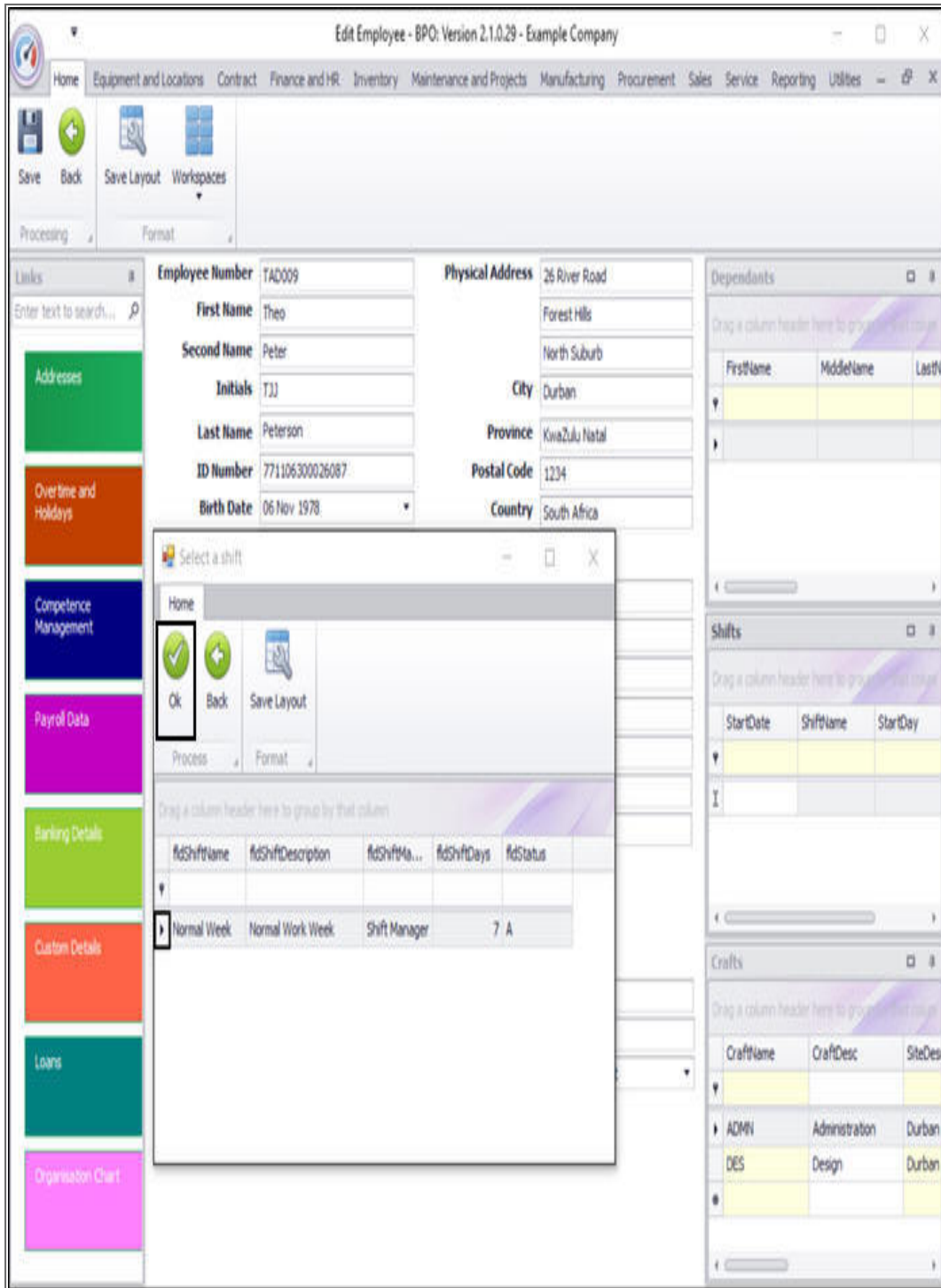
- Employee Information:** Employee Number (TAD009), First Name (Theo), Second Name (Peter), Initials (TJ), Last Name (Peterson), ID Number (771106300026087), Birth Date (06 Nov 1978), Phone Number (W) (031 258 1425), Extension (W) (198), Phone Number (H) (031 654 1234), Fax Number (031 789 1414), Mobile Number (083 258 1425), Email Address (ted@noemail.co.za), Passport Number (1593574862), Marital Status (Single), Manager (Belinda Sherman), 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).
- 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).

On the right side, there are three tables:

- Dependants:** A table with columns First Name, Middle Name, and Last Name.
- Shifts:** A table with columns Start Date, Shift Name, and Start Day. A 'Process' menu is open over this table, showing options for 'Shift - Add new shift' and 'Delete - Delete shift'.
- Crafts:** A table with columns Craft Name, Craft Desc, and Site Desc. It contains two rows: ADMN (Administration, Durban) and DES (Design, Durban).

The **Select a shift** screen will be displayed.

- Click on the **row selector** in front of the **shift** you wish to assign to this employee.
- Click on **Ok**.



- The selected shift will now be displayed in the **Shift Name** column of the **Shifts** docking panel.

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
- 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

Drag a column header here to group or sort columns

Firstname	MiddleName	LastN

Shifts

Drag a column header here to group or sort columns

StartDate	ShiftName	StartDay
I 22 Aug 2017	Normal Week	

Crafts

Drag a column header here to group or sort columns

CraftName	CraftDesc	SiteDes
ADMN	Administration	Durban
DES	Design	Durban

SELECT START DATE

- The ***Start Date*** column will auto populate with the current date.
- Click on the ***drop-down arrow*** in the date field to display the ***calendar***.
- Click on the correct ***start date***.

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

Employee Number	TAD009	Physical Address	26 River Road	Dependants	
First Name	Theo		Forest Hills		
Second Name	Peter		North Suburb		
Initials	TJ	City	Durban		
Last Name	Peterson	Province	KwaZulu Natal		
ID Number	771106300026087	Postal Code	1234		
Birth Date	06 Nov 1978	Country	South Africa		
Phone Number (W)	031 258 1425	Postal Address			
Extension(W)	198				
Phone Number (H)	031 654 1234	City			
Fax Number	031 789 1414	Province			
Mobile Number	083 258 1425	Postal Code			
Email Address	ted@noemail.co.za	Country			
Passport Number	1593574862	Branch Name	Forest Hill		
Marital Status	Single	Branch Code	202020		
Manager	Belinda Sherman	Account Type	Savings Account		
Department	Technical				
User ID	BPOsysAdmin				
Bank Name	Nedbank				
Account Name	Mr T P Peterson				
Account Number	0987654321				
Default Account	<input type="checkbox"/>				

Shifts

Start Date	Shift Name	Start Day
22 Aug 2017	Normal Week	

22 August 2017

August 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	31	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

ADMIN Administration Durban
DES Design Durban

- The selected date will now be displayed in the **Start Date** column.

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
- Competence Management
- Payroll Data
- Banking Details
- Custom Details
- Loans
- Organisation Chart

Employee Number	TAD009	Physical Address	26 River Road
First Name	Theo		Forest Hills
Second Name	Peter		North Suburb
Initials	TJ	City	Durban
Last Name	Peterson	Province	KwaZulu Natal
ID Number	771106300026087	Postal Code	1234
Birth Date	06 Nov 1978	Country	South Africa
Phone Number (W)	031 258 1425	Postal Address	
Extension(W)	198		
Phone Number (H)	031 654 1234	City	
Fax Number	031 789 1414	Province	
Mobile Number	083 258 1425	Postal Code	
Email Address	ted@noemail.co.za	Country	
Passport Number	1593574862	Branch Name	Forest Hill
Marital Status	Single	Branch Code	202020
Manager	Belinda Sharman	Account Type	Savings Account
Department	Technical		
User ID	BPOSysAdmin		
Bank Name	Nedbank		
Account Name	My T P Peterson		
Account Number	0987654321		
Default Account	<input type="checkbox"/>		

Dependants

Drag a column header here to group or sort rows

First Name	Middle Name	Last Name

Shifts

Drag a column header here to group or sort rows

StartDate	ShiftName	StartDay
09 Aug 2017	Normal Week	

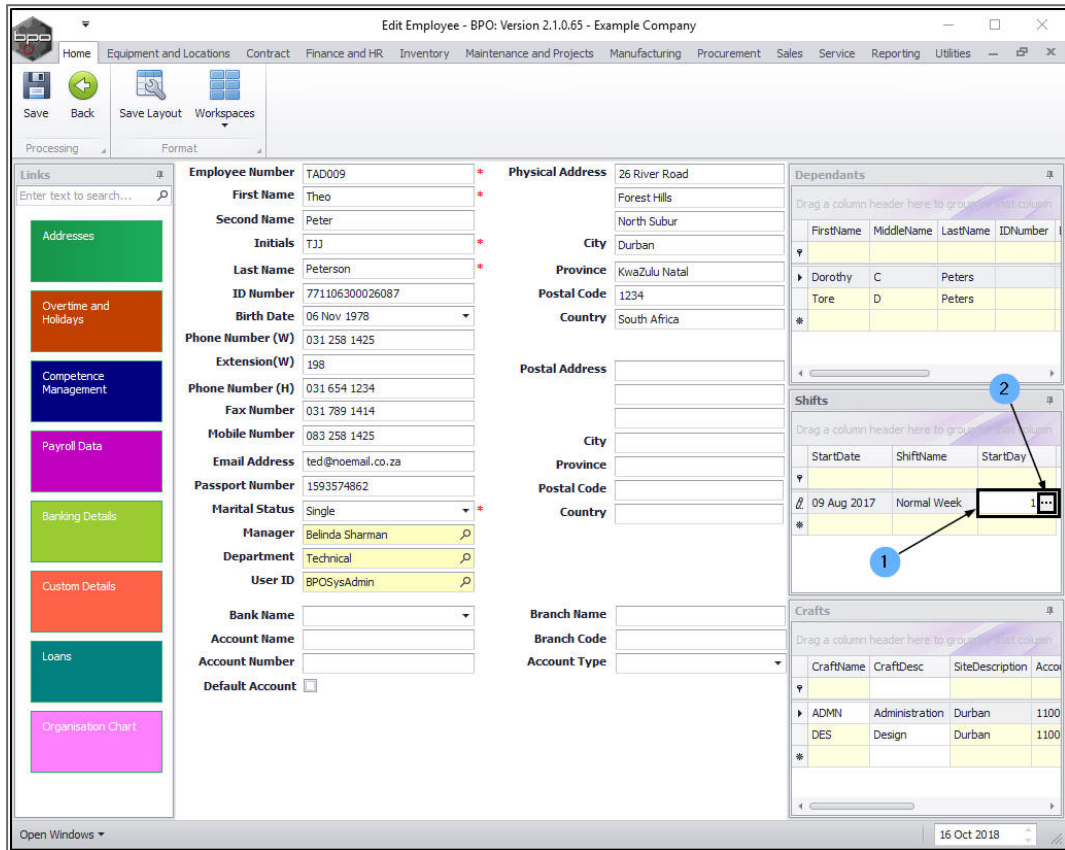
Crafts

Drag a column header here to group or sort rows

CraftName	CraftDesc	SiteDes
ADMN	Administration	Durban
DES	Design	Durban

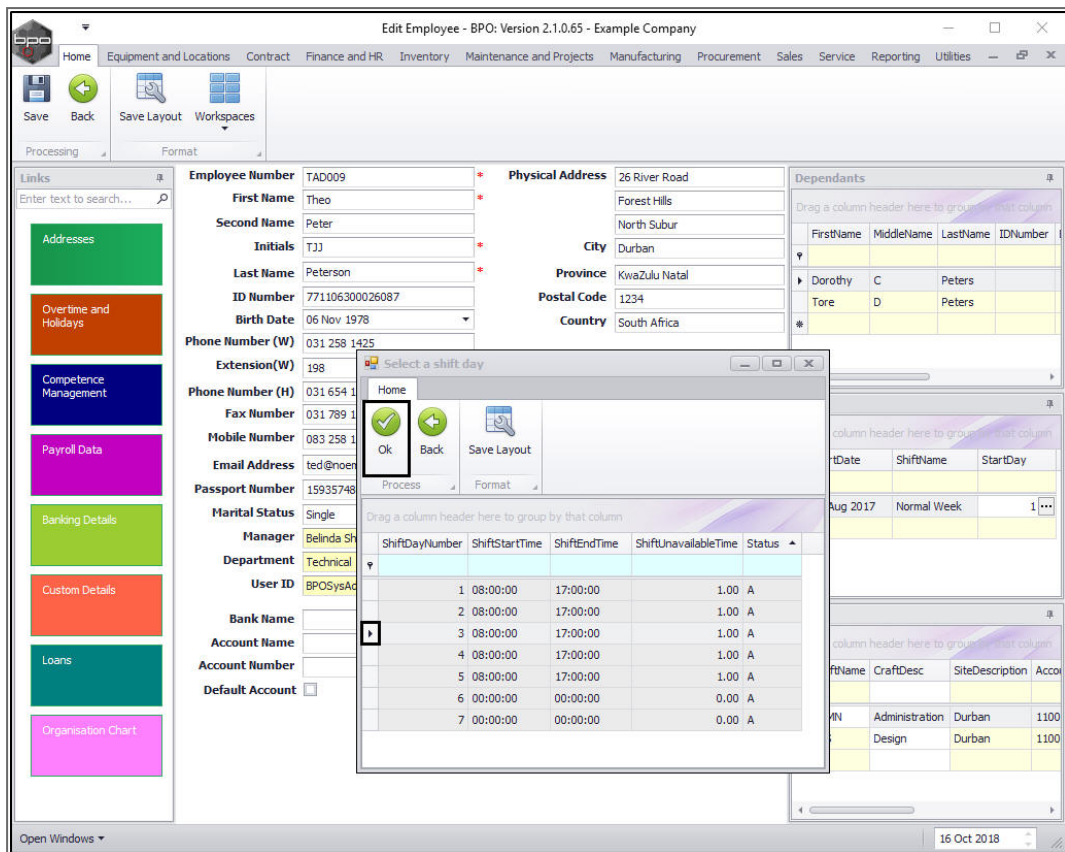
SELECT START DAY

1. Scroll right in the Shifts panel to the **Start Day** column and click in this field.
2. An **ellipsis button** will be revealed, click on this button.



The **Select a shift day** look up screen will pop up.

- Click on the **row selector** in front of the appropriate start day number: (Monday = **1**, Tuesday = **2**, Wednesday = **3**) etc.
- Click on **Ok**.



- The selected start day date will now be displayed in the **Start Day** column.

SAVE SHIFT ASSIGNMENT

- When you have finished adding the shift details to this employee, click on **Save**.

Edit Employee - BPO: Version 2.1.0.65 - 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
- Competence Management
- Payroll Data
- Banking Details
- Custom Details
- Loans
- Organisation Chart

Employee Number	TAD009	Physical Address	26 River Road
First Name	Theo		Forest Hills
Second Name	Peter		North Subur
Initials	TJJ	City	Durban
Last Name	Peterson	Province	KwaZulu Natal
ID Number	771106300026087	Postal Code	1234
Birth Date	06 Nov 1978	Country	South Africa
Phone Number (W)	031 258 1425	Postal Address	
Extension(W)	198		
Phone Number (H)	031 654 1234	City	
Fax Number	031 789 1414	Province	
Mobile Number	083 258 1425	Postal Code	
Email Address	ted@noemail.co.za	Country	
Passport Number	1593574862	Branch Name	
Marital Status	Single	Branch Code	
Manager	Belinda Sharman	Account Type	
Department	Technical		
User ID	BPOSysAdmin		
Bank Name			
Account Name			
Account Number			
Default Account	<input type="checkbox"/>		

Dependants

Drag a column header here to group or sort column

FirstName	MiddleName	LastName	IDNumber
Dorothy	C	Peters	
Tore	D	Peters	

Shifts

Drag a column header here to group or sort column

StartDate	ShiftName	StartDay
09 Aug 2017	Normal Week	3

Crafts

Drag a column header here to group or sort column

CraftName	CraftDesc	SiteDescription	Acco
ADMN	Administration	Durban	1100
DES	Design	Durban	1100

Open Windows 16 Oct 2018

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

CO3 Edit Employee - BPO: Version 2.1.0.65 - 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
- Competence Management
- Payroll Data
- Banking Details
- Custom Details
- Loans
- Organisation Chart

Employee Number	TAD009	Physical Address	26 River Road
First Name	Theo		Forest Hills
Second Name	Peter		North Subur
Initials	TJJ	City	Durban
Last Name	Peterson	Province	KwaZulu Natal
ID Number	771106300026087	Postal Code	1234
Birth Date	06 Nov 1978	Country	South Africa
Phone Number (W)	031 258 1425	Postal Address	
Extension (W)	198		
Phone Number (H)	031 654 1234	City	
Fax Number	031 789 1414	Province	
Mobile Number	083 258 1425	Postal Code	
Email Address	ted@noemail.co.za	Country	
Passport Number	1593574862		
Marital Status	Single		
Manager	Belinda Sharman		
Department	Technical		
User ID	BPOSysAdmin		
Bank Name			
Account Name			
Account Number			
Default Account	<input type="checkbox"/>		

Dependants

Drag a column header here to group or sort column

FirstName	MiddleName	LastName	IDNumber
Dorothy	C	Peters	
Tore	D	Peters	

Shifts

Drag a column header here to group or sort column

StartDate	ShiftName	StartDay
09 Aug 2017	Normal Week	3

Crafts

Drag a column header here to group or sort column

CraftName	CraftDesc	SiteDescription	Acco
ADMN	Administration	Durban	1100
DES	Design	Durban	1100

Employee : TAD009 has been saved

OK

Open Windows 16 Oct 2018

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

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