

HUMAN RESOURCES

ASSIGN A USER LOGIN TO AN EMPLOYEE

All employees should be loaded onto BPO, but only those <u>using BPO</u> will be assigned a **User ID**, which is linked to their employee details.

It is important to ensure that all users are correctly linked to their <u>employee</u> <u>details</u>.

Ribbon Access: Finance and HR > Employees



1. The *Employees* listing screen will open.

SELECT EMPLOYEE

- 2. Select the *row* of the employee to whom you wish to assign a *User ID*.
- 3. Click on *Edit*.



Assign a User Login to an Employee

	,			1	Emplo	yees - BPO: Version 2.5.0.0 - Example O	company v2.5.0.0				_		х
	Home	Equipr	nent /	Locations Contract	Finance / HR Inv	entory Maintenance / Projects Manufa	acturing Procuren	nent Sales	Service Re	porting Utilit	es .	- 8	×
Add	Edit	X Delete	View	Save Layout Work	spaces Reports E	Refresh Print							
	Mainten	ance		3 Format		a Curr a Print a							\Diamond
Links		ų	-										
Enter te	ext to sear	ch)	ρ	EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Statue	
			9	allo	REC	sac	allo	allo	BEC	allo	allo	REC	
Add	dresses		Ė	BAL001	Steven Conner	Steven@TEST ALPHA v2 4 0 0 DB co za	Belinda Sharman		-	-	-	Δ.	- 1
				BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			A	
				BLY001	Arial Blythe	Arial@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
Ov Hol	ertime and idavs			CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A	
				DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						A	
			Þ	DAV001	David Rowe	davidr@testemail.coza			01010101	03030303	01	A	
Cor	mpetence			DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
Ma	nagement	agement	T	DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A	1
				DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A	Ĩ
Pay	yroll Data			DUT004	Test Employee	t Employee Test@TEST ALPHA v2.4.0.0 DB.co.za					A		
			DUT005		Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						Α	
			Ý	DUT010 Bianca Surendor		Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A	
Bar				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	U
				EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					Α	
Que	stom Detail	s		HAR001 Wesley Haynes Wesley@TEST ALPHA v2.4.0.0 DB.co.za Bianca Du Toit						A			
				JO001	Sasha Jones		Bianca Du Toit	Sales				A	
				JOH001	Michael-Stark Johns	Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					A	
1.00				JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A	
Loa	ins			KES001	Julanda Kessler			Sales				A	
				KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
				MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	
				MUD001	Judith Mudaonai	Audith @TECT ALDUA VO 4 0 0 DP co 20	Pinnen Du Toit	Salar	172 /66 7900			Δ	_

SEARCH FOR USER ID

- 1. The *Edit Employee* screen will be displayed.
- 2. Click on the *search* button in the *User ID* field.



¢ ·	Edit Employee	- BPO: Version 2.5.0.0 - E	cample Company v2.5.0.0													
Home Equipment / Locations Cont	act Finance / HR Inventory	Maintenance / Projects	Manufacturing Procurement	S	ales Ser	vice Repor	ting Utiliti	es —	₽ x							
Save Back Save Layout Workspaces																
Dressering Earmat																
Finder a Employee Number	r Dav001	Physical Address	1 Deval Heuro	[
Enter text to search O First Nam	David	•	Deval Dead	De	ependants				4							
Second Nam	Christenher	1	Royal Rodu													
Addresses Toitia		* (ib)	Royal Town		FirstName	MiddleName	LastName	IDNumber	BirthDat							
	, DC	city	Royal City	٩	RBC	RBC	RBC	8 8 0	=							
Last Nam	Rowe	 Province 	Royal Province	۲												
Overtime and ID Number	r 01020304	Postal Code	RYL01													
Holidays Birth Dat	28/06/1970 -	Country	SA													
Phone Number (W	01010101	1010101							4 Þ							
Competence Extension(W	01	Postal Address		Sh	ifts											
Management Phone Number (H	02020202															
Fax Number	r				Chard Date	chil	a group by u	CharalDa	Cha							
Pavroll Data Mobile Number	03030303	City			StartDate	STIL	uvame	StartDa	ly Stal							
Email Addres	davidr@testemail.coza	Province		Ľ.	-	10 C										
Passport Number	r 040400404	Postal Code		*												
Banking Details Marital Statu	Married 🔻	Country														
Manage	م م			4					E.							
Departmen	ر م			Cr	afts				4							
Custom Details User I	م	2			ag a column											
Bank Nam	•	Branch Name			CraftName	CraftDesc	SiteDesc	ription Accou	ntCode CC							
Account Nam	2	Branch Code		٩	8 8 0	REC	88 C	REC	яĘ							
Loans Account Number	r	Account Type	-	×	CON	Consulting	Durban	1100	21							
Default Accourt	t 🔲			*												
Organisation Chart				4					E.							
				0					6							

SELECT USER ID

- 1. The *Select the User* screen will be displayed.
- Select the *row* of the *UserName* that you would like to allocate to this employee.
 - ° In this example, **DR001** is selected.
- 3. Click on OK.

Note: A UserName / ID cannot be assigned to <u>more than one</u> employee. Ensure that a <u>unique</u> <u>User ID and Login</u> has been set up in the *Configurator* before you attempt to link an ID to an employee.



		Edit Employee	e - BPO: \	/ersion 2.5.0.0 - E	xample Company	v2.5.0.0			(ıx			
Home Equipme	ent / Locations Contrac	t Finance / HR Inventory	Maint	enance / Projects	Manufacturing	Procurement	Sales	Service Reporting	Utilities	- 4	9 ×			
Save Back Save Layor	ut Workspaces		1											
Links #	Employee Number	DAV001	•	Physical Address	1 Royal House		Dependa	nts			4			
Enter text to search P	First Name	David	• 1		Royal Road		Deserved	una haadar hara ta ara	in her that cal	1				
	Second Name	Christopher	0	Select the User						1 X	irthDat			
Addresses	Initials	DC	•	Home							-			
	Last Name	Rowe	· 7		SI									
Questions and	ID Number	01020304			658									
Holidays	Birth Date	28/06/1970	•	OK Back S	ave Layout									
	Phone Number (W)	01010101		Process A Format										
Competence	Extension(W)	01		Drag a column header here to group by that column										
Management	Phone Number (H)	02020202		LiserName	Liser FullName	Emple	veeName	EmployeeFirstName	EmployeeLastN:	lame				
	Fax Number		Ŷ	8 0 0	8 C	800	,	48 C	REC	+				
Pavroll Data	Mobile Number	03030303		CO3Admin	CO3 Administrator	David	d Rowe	David	Rowe		Star			
	Email Address	s davidr@testemail.coza		CurtisP	Curtis Peppher	Kame	Pillay	Kame	Pillay		H			
	Passport Number			DaleneP	Dalene Pillay									
Banking Details	Marital Status	Married 2	•	DR001	David Rowe					U				
	Manager	\$	c	EdwellM	Edwell Msakwa						+			
	Department	۶	-	FayeL	Faye Lagenhoven						4			
Custom Details	User ID	۶	-	GaryB	Gary Buchner	Andil	e Khumalo	Andile	Khumalo					
	Bank Name			James M	James Magombo	Sahe	lo Danisa	Sabelo	Danica		e co			
	Account Name		- F	JohanV	Johan van der Linde	2	io Danisa	50500	L'unitati		PE			
Loans	Account Number		1				_			+	21			
	Default Account						*							
Organisation Chart											Þ			

SAVE USER ID/LOGIN DETAILS

- The new user *ID / Login* is now assigned and displayed in the *User ID* field.
- 2. Click on *Save* to keep the User ID detail.



\$ 7	Edit Employee - BPO: \	/ersion 2.5.0.0 - Example	Company v2.5.0.0						
Home Equipment / Locations Contra	t Finance / HR Inventory	Maintenance / Projects	Manufacturing Procurement	Sa	les Servi	e Repore		₽ ×	
Save Back Save Layout Workspaces									
Processing 2 mat								\sim	
Links # Employee Number	DAV001	* Physical Address	1 Royal House	D	ependants			4	
Enter text to search P First Name	David	•	Royal Road	Ī,					
Second Name	Christopher]	Royal Town		FirstName	MiddleName	LactName	TDNumb	
Addresses Initials	DC	* City	Royal City	ę	REC	REC	RBC	REC	
Last Name	Rowe	* Province	Royal Province	i,	-		-		
ID Number	01020304	Postal Code	RYL01	1					
Holidays Birth Date	28/06/1970 -	Country	SA						
Phone Number (W)	01010101			4				F	
Extension(W)	01	Postal Address		Shifts					
Management Phone Number (H)	02020202			Б					
Fax Number					StartDate	Shif	Name	St	
Payroll Data Mobile Number	03030303	City		ę	=	REC	a varrie	=	
Email Address	davidr@testemail.coza	Province		*					
Passport Number	040400404	Postal Code		i –					
Banking Details Marital Status	Married 🔻	Country							
Manager	م								
Department	م			CI	rafts			4	
Custom Details User ID	DavidR P			D	rag a column				
Bank Name		Branch Name			CraftName	CraftDesc	SiteDesc	ription A	
Account Name		Branch Code		٩	880	R B C	RBC	В	
Loans Account Number		Account Type		Þ	CON	Consulting	Durban	1	
Default Account				*					
								•	

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



(a) =				Edit Empl	oyee - BPO: V	/ersi	on 2.5.0.0 - Example	e Company v2.5.	0.0					_		
Home	Equipment	/Locations	Contract	Finance / HR	Inventory	Mair	ntenance / Projects	Manufacturing	Procur	ement	Sal	les Servi	e Repor). –	₽ X	
	Z															
Save Back Sa	ave Layout	Workspaces														
Processing 4	For	mat	4												\diamond	
Links	4	Employee N	lumber	DAV001		*	Physical Address	1 Royal House			De	ependants			4	
Enter text to search	. <i>р</i>	First	t Name	David		•		Royal Road			Dr					
		Second	l Name	Christopher]		Royal Town				FirstName	MiddleName	LastName	IDNumb	
Addresses		1	Initials	DC		*	City	Royal City			ę	REC	ROC	RBC	REC	
		Las	t Name	Rowe		*	Province	Royal Province								
Overtime and		ID N	lumber	01020304			Postal Code	RYL01								
Holidays		Birt	h Date	28/06/1970	•		Country	SA			1					
		Phone Numb	er (W)	01010101							4				F	
Competence		Extens	ion(W)	01]	Postal Address				Sh	nifts			ų.	
Management		Phone Number (H)		02020202				×			Drag a column header here to group that c					
		Fax N	lumber	1					~		ŀ	StartDate	Shi	ftName	St	
Pavroll Data		Mobile N	lumber	03030303			Employee (DAV00)	1 has been saved			ę	=	80	:		
		Email Address		davidr@testemail.coza			Employee : DAV00	Thas been saved			*					
		Passport N	lumber	040400404			-	_	-							
Banking Details		Marital	Status	Married	•		2>	OK						_		
		M	anager		Q		<u> </u>				Ľ	~				
		Depa	rtment		Q						Cr	atts			#	
Custom Details		, i	Jser ID	DavidR	Q						Dr	ag a column				
		Bank	Name		•	1	Branch Name					CraftName	CraftDesc	SiteDesc	cription A	
		Account	t Name			1	Branch Code				٩	R B C	a 🛛 C	RBC	8	
Loans		Account Number				1	Account Type			-		CON	Consulting	Durban	1	
		Default A	ccount								*					
												_				
															*	

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

MNU.021.009