

# HUMAN RESOURCES

## LINK A DEPARTMENT TO AN EMPLOYEE

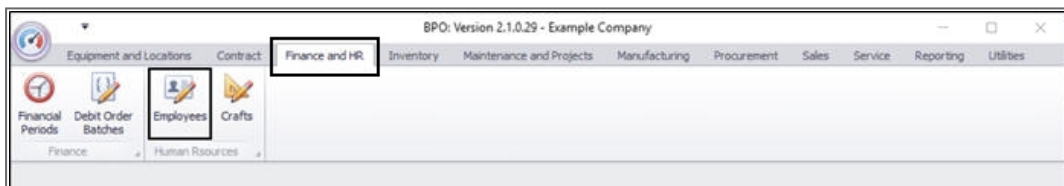
It is vital to link a department to an employee and set up the department association - where the company is using a segmented chart of accounts, and one of the segments is based on the employee's department.

**Departments - employee association** must be configured in the configuration settings (this is the link that is required for the financial transactions to process to the correct segmented ledger accounts).

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

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- The **Employees** listing screen will be displayed.

## SELECT EMPLOYEE

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- Select the **row** of the **employee** to whom you wish to link a **department**.
- Click on **Edit**.

Employees - 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

Add Edit Delete Save Layout Workspaces Reports Excel Refresh

Links

Enter text to search...

Drag a column header here to group by that column

IdEmployeeID	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 Suzetta Lourens...		Susan Du Toit
8	TWA001	Jonothan-Mark Twain-Sut...	jona@noemail.co.za	Belinda Sharman
9	STE001	Markus Arlius Stevenson ...	judith.mudzeng@co3.co.za	Jonothan-Mark Twain-Sutton-under-Whitestone
10	JOH001	Michael-Stark Johnson St...	mike@noemail.co.za	Markus Arlius Stevenson Rodenhizer Tomljenovic
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		

Addresses

Overtime and Holidays

Competence Management

Payrol Data

Banking Details

Custom Details

Loans

Organisation Chart

### **SELECT DEPARTMENT**

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- The ***Edit Employee*** screen will open.
- Click on the search icon in the ***Department*** field.

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

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

**Dependants**

Drag a column header here to give it a sort order

Firstname	MiddleName	LastN

**Shifts**

Drag a column header here to give it a sort order

StartDate	ShiftName	StartDay

**Crafts**

Drag a column header here to give it a sort order

CraftName	CraftDesc	SiteDes
ADMN	Administration	Durban
DES	Design	Durban

- The **Select the Department** screen will open.
- Select the **row** of the Department you wish to link to this employee.
- Click on **Ok**.

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
- Payrol Data
- Banking Details
- Custom Details
- Loans
- Organisation Chart

Select the Department

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

DEPTDepartment	DEPTDepartmentDescription	Status
Sales	Sales Department	A
Tech	Technical	A

Department: Technical

User ID: BPOSysAdmin

Bank Name: Nedbank

Branch Name: Forest Hill

Account Name: Mr T P Peterson

Branch Code: 202020

Account Number: 0987654321

Account Type: Savings Account

Default Account:

Dependants

Firstname	MiddleName	LastN

Shifts

StartDate	ShiftName	StarDay

Crafts

CraftName	CraftDesc	SiteDes
ADMN	Administration	Durban
DES	Design	Durban

## SAVE LINKED DEPARTMENT

- The selected department will now populate the *Department* field.
- **Save** the changes.

**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, Forest Hills, North Suburb, Durban, KwaZulu Natal, 1234, South Africa

**Postal Address:** (Empty fields)

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

**Personal Details:** 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 Sharman, Department: Sales Department, User ID: BPOSysAdmin

**Bank Details:** Bank Name: Nedbank, Account Name: Mr T P Peterson, Account Number: 0987654321, Default Account:

**Dependants:** (Table with columns: FirstName, MiddleName, LastName)

**Shifts:** (Table with columns: StartDate, ShiftName, StartDay)

**Crafts:** (Table with columns: CraftName, CraftDesc, SiteDes)

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