

HUMAN RESOURCES

VIEW, ADD, EDIT, DELETE SHIFTS

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

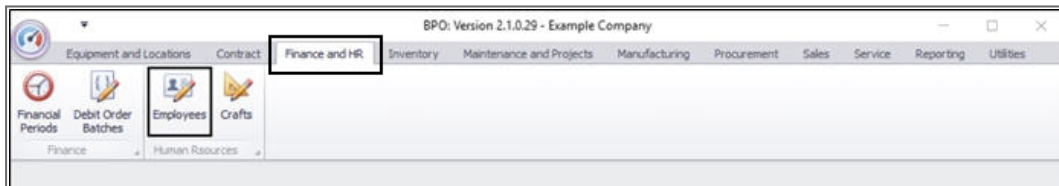
1 normal work week shift is required for technicians and SLA monitoring.

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.

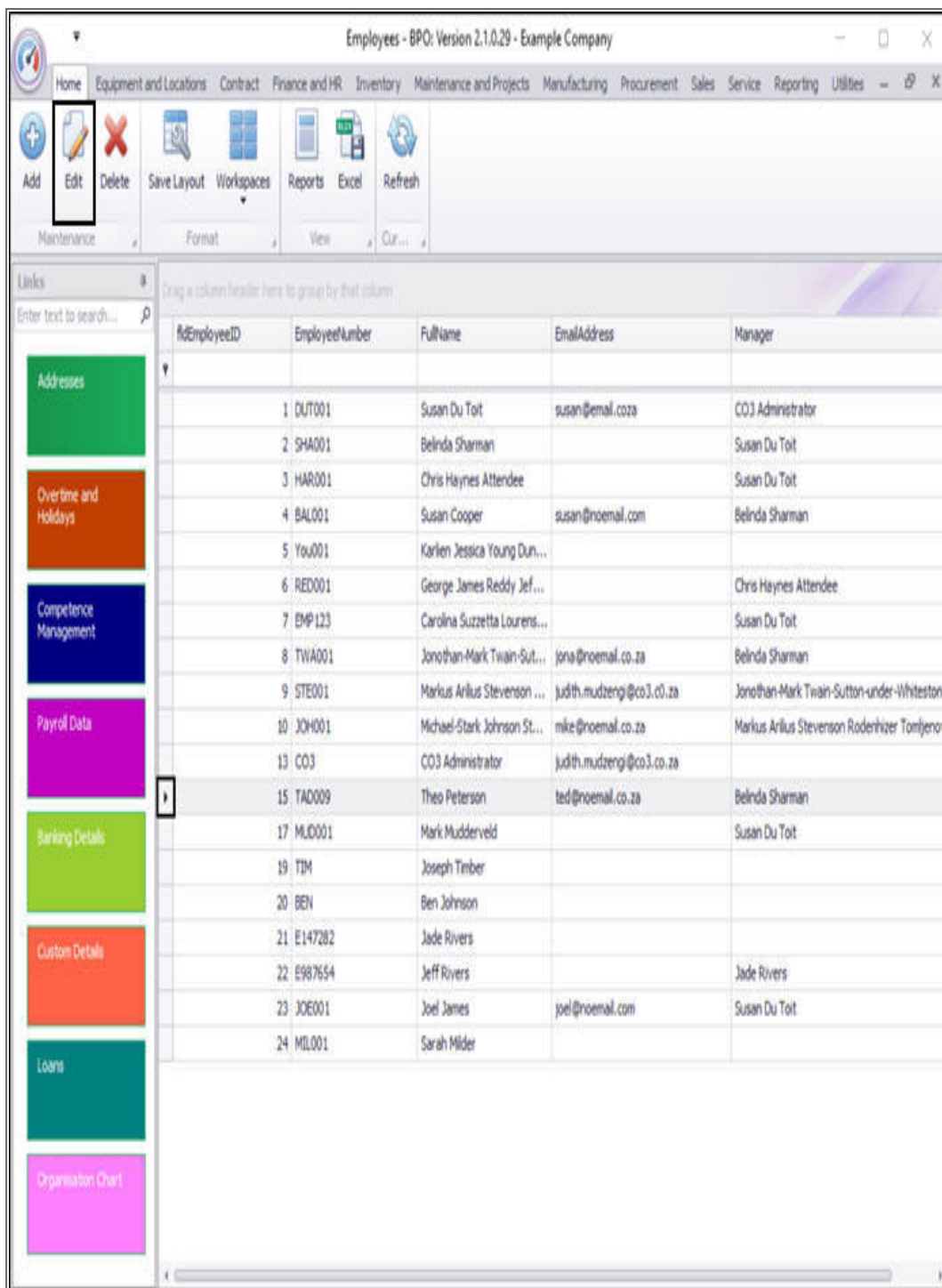
Ribbon Access: *Finance and HR > Employees*



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.

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 Sharman

Department Technical

User ID BPOSysAdmin

Bank Name Nedbank

Account Name My 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 grow/shrink column

First Name	Middle Name	Last Name

Shifts

Drag a column header here to grow/shrink column

StartDate	ShiftName	StartDay

Crafts

Drag a column header here to grow/shrink column

CraftName	CraftDesc	SiteDes
ADMIN	Administration	Durban
DES	Design	Durban

- 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	Employee Number	Physical Address	Dependants
Addresses Overtime and Holidays Competence Management Payroll Data Banking Details Custom Details Loans Organisation Chart	First Name	City	First Name
	Second Name	Province	Middle Name
	Initials	Postal Code	Last Name
	Last Name	Country	
	ID Number	Postal Address	
	Birth Date	City	
	Phone Number (W)	Province	
	Extension(W)	Postal Code	
	Phone Number (H)	Country	
	Fax Number	Branch Name	
Mobile Number	Branch Code		
Email Address	Account Type		
Passport Number			
Marital Status			
Manager			
Department			
User ID			
Bank Name			
Account Name			
Account Number			
Default Account			

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**.

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

Over time 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

Physical Address 26 River Road

Forest Hills

North Suburb

City Durban

Province KwaZulu Natal

Postal Code 1234

Country South Africa

Dependants

Drag a column header here to group by that column

First Name	Middle Name	Last Name

Shifts

Drag a column header here to group by that column

StartDate	ShiftName	StartDay

Crafts

Drag a column header here to group by that column

CraftName	CraftDesc	SiteDesc
ADMIN	Administration	Durban
DES	Design	Durban

Select a shift

Home

Ok Back Save Layout

Process Format

Drag a column header here to group by that column

fdShiftName	fdShiftDescription	fdShiftManager	fdShiftDays	fdStatus
Normal Week	Normal Work Week	Shift Manager	7 A	

- 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 by that column

First Name	Middle Name	Last Name

Shifts

Drag a column header here to group by that column

StartDate	ShiftName	StartDay
I 22 Aug 2017	Normal Week	

Crafts

Drag a column header here to group by that column

CraftName	CraftDesc	SiteDes
ADMIN	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

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 TJD

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 and sort columns

First Name	Middle Name	Last Name

Shifts

Drag a column header here to group and sort columns

StartDate	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

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

User ID BPOSysAdmin

Bank Name Nedbank

Account Name My 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 by that column

First Name	Middle Name	Last Name

Shifts

Drag a column header here to group by that column

StartDate	ShiftName	StartDay
09 Aug 2017	Normal Week	

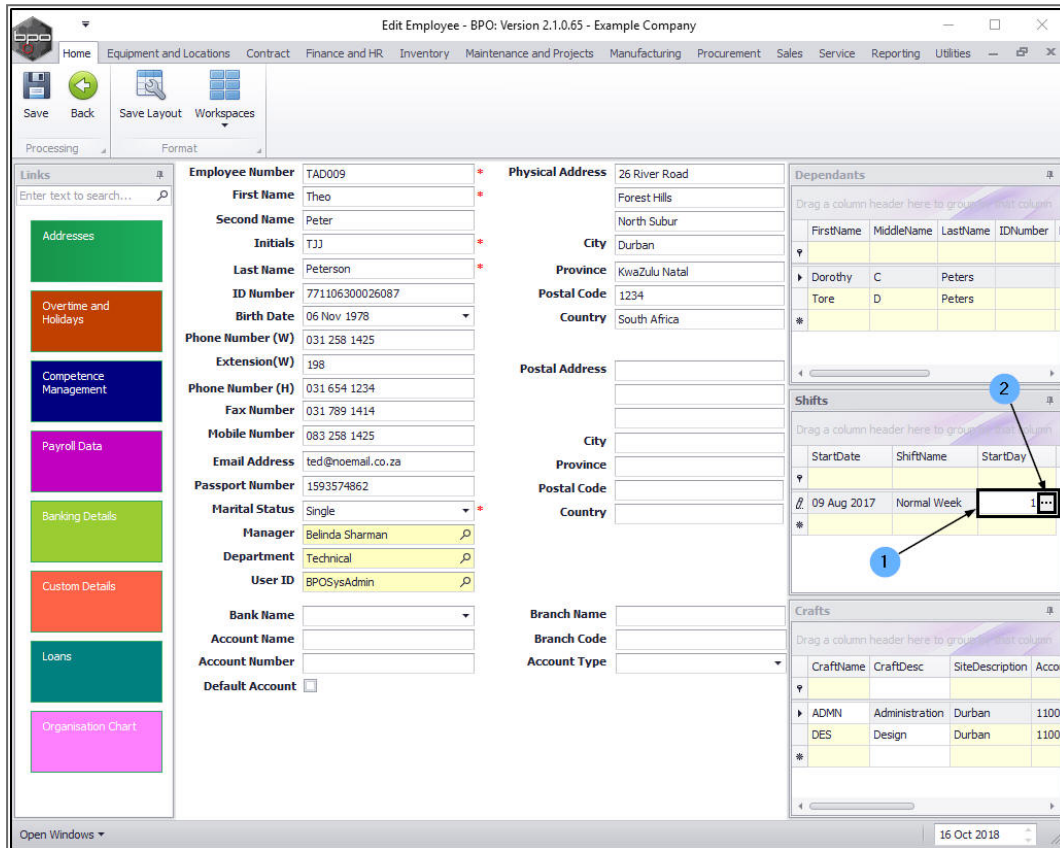
Crafts

Drag a column header here to group by that column

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.



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 Sharman
 Department: Technical
 User ID: BPOSysAdmin
 Bank Name:
 Account Name:
 Account Number:
 Default Account: ☐

Physical Address: 26 River Road
 Forest Hills
 North Subur
 City: Durban
 Province: KwaZulu Natal
 Postal Code: 1234
 Country: South Africa

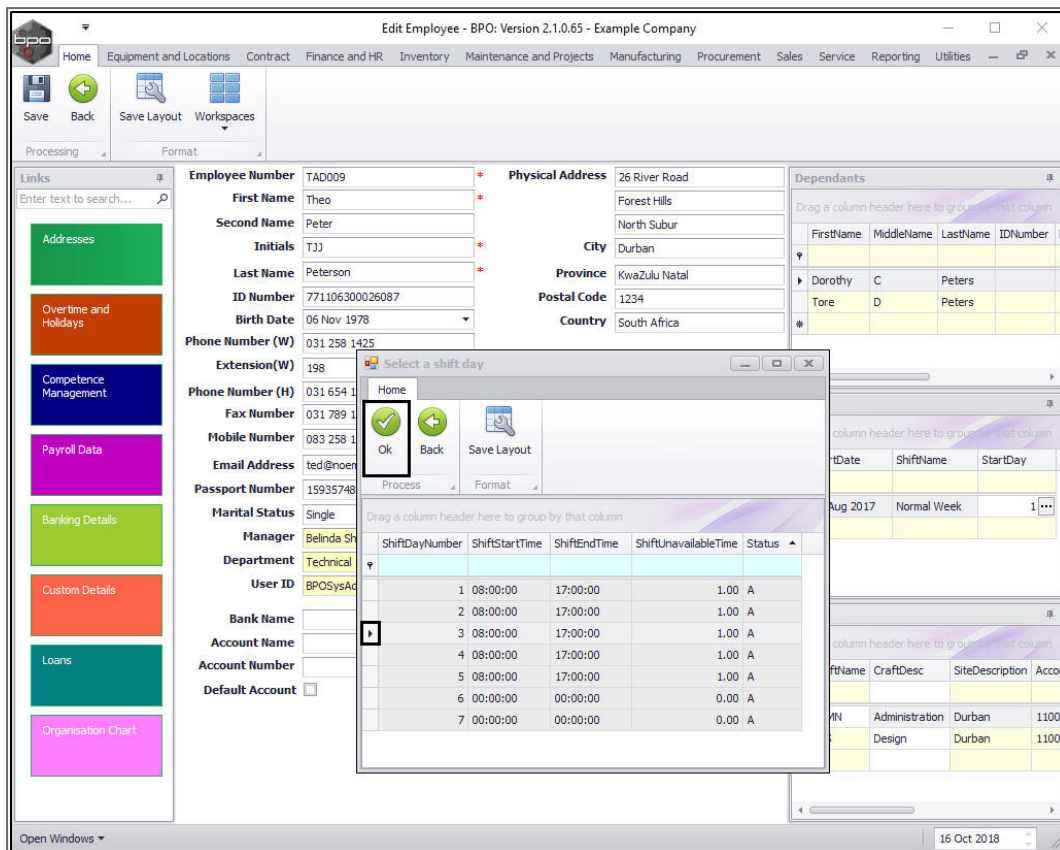
Postal Address:
 City:
 Province:
 Postal Code:
 Country:
 Branch Name:
 Branch Code:
 Account Type:
 Account Number:
 Default Account: ☐

Shifts

StartDate	ShiftName	StartDay
09 Aug 2017	Normal Week	1

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**.



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

Extension(W) 198

Phone Number (H) 031 654 1

Fax Number 031 789 1

Mobile Number 083 258 1

Email Address ted@noet

Passport Number 15935748

Marital Status Single

Manager Belinda SH

Department Technical

User ID BPOSysAd

Bank Name

Account Name

Account Number

Default Account ☐

Select a shift day

ShiftDayNumber	ShiftStartTime	ShiftEndTime	ShiftUnavailableTime	Status
1	08:00:00	17:00:00	1.00	A
2	08:00:00	17:00:00	1.00	A
3	08:00:00	17:00:00	1.00	A
4	08:00:00	17:00:00	1.00	A
5	08:00:00	17:00:00	1.00	A
6	00:00:00	00:00:00	0.00	A
7	00:00:00	00:00:00	0.00	A

Dependants

FirstName	MiddleName	LastName	IDNumber
Dorothy	C	Peters	
Tore	D	Peters	

Start Day 16 Oct 2018

- 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 *
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 Technical
User ID BPOSysAdmin
Bank Name
Account Name
Account Number
Default Account ☐

Physical Address 26 River Road
Forest Hills
North Subur
Durban
City
Province KwaZulu Natal
Postal Code 1234
Country South Africa
Postal Address
City
Province
Postal Code
Country
Branch Name
Branch Code
Account Type

Dependants
Drag a column header here to group or sort column

First Name	Middle Name	Last Name	ID Number
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	Account
ADMIN	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**.

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 *

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 Technical

User ID BPOSysAdmin

Bank Name

Account Name

Account Number

Default Account ☐

Physical Address 26 River Road

Forest Hills

North Subur

City Durban

Province KwaZulu Natal

Postal Code 1234

Country South Africa

Postal Address

City

Province

Postal Code

Country

Dependants

Drag a column header here to group or sort column

First Name	Middle Name	Last Name	ID Number
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	Account
ADMIN	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.

MNU.021.006