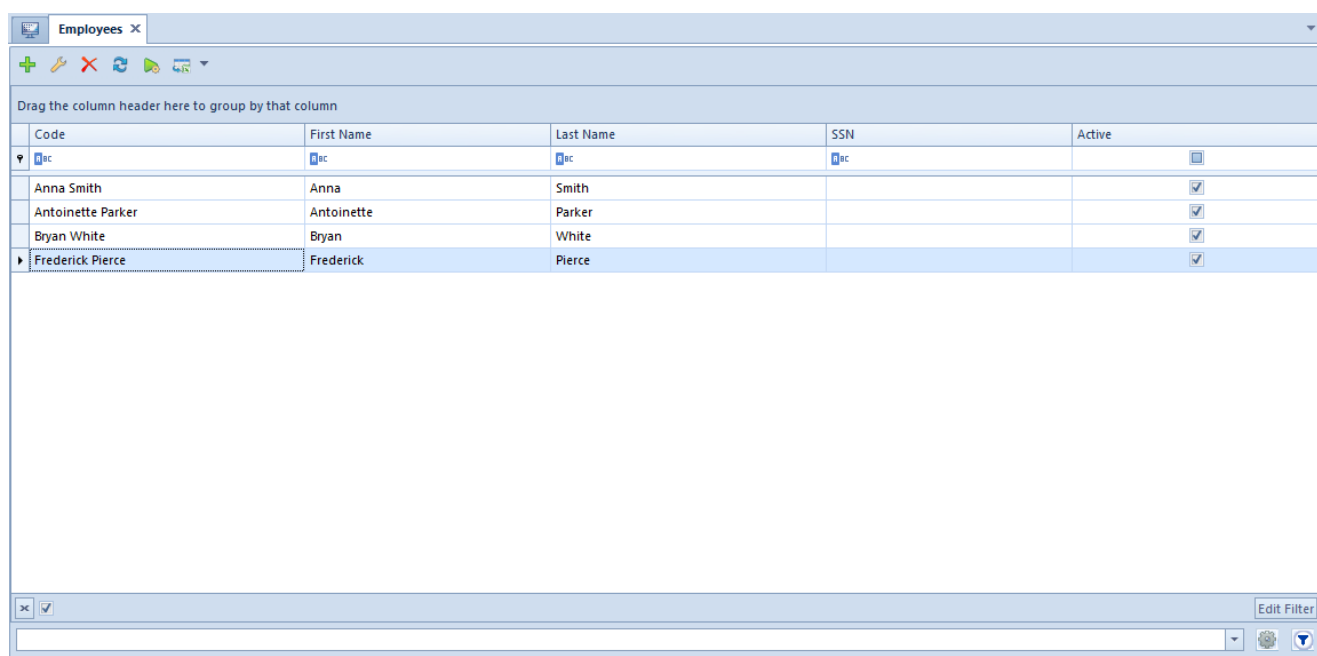


# List of employees

The list of employees contains information regarding individual employees of the company. The data of registered employees is used for the establishment of <<permissions>> to particular functions and in particular elements in the system, e.g. an employee can be set as a person responsible for a given customer (tab CRM on customer/vendor form).

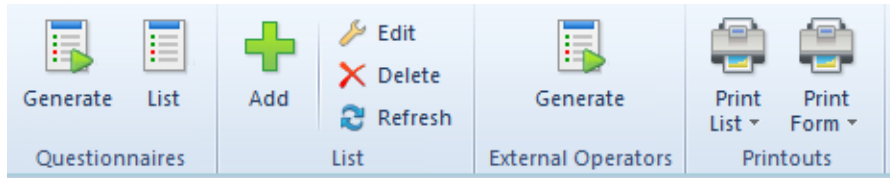
In order to open the list of employees, it is necessary to go to the *Main* menu and then, from *Directory List* group of buttons, select [**Employees**] button.



Code	First Name	Last Name	SSN	Active
ec	ec	ec	ec	<input type="checkbox"/>
Anna Smith	Anna	Smith		<input checked="" type="checkbox"/>
Antoinette Parker	Antoinette	Parker		<input checked="" type="checkbox"/>
Bryan White	Bryan	White		<input checked="" type="checkbox"/>
Frederick Pierce	Frederick	Pierce		<input checked="" type="checkbox"/>

## List of employees

Menu of the list of employees contains <<standard buttons>> allowing for adding/editing/deleting of employees, menu of printouts and buttons for <<generating questionnaires>>. *External Operators* button group contains button [**Generate**] thanks to which it is possible to automatically create external <<operators>> associated with selected employees.



Menu of the list of employees

The list of employees is composed of the following columns:

- **Code**
- **Name**
- **Surname**
- **SSN**
- **NIN**
- **Active** – parameter informing whether a given employee can be used in other places of the system

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# Defining employee

## General information

A new employee can be added by clicking on [**Add**] button placed in the main menu or ergonomic panel above the [list of employees](#). A form of new employee opens. *General, Contacts, Accounting, E-mail Account, Bank Accounts, Attributes, Attachments*

## Tab General

General	Employee's Fixed Assets	Contracts	Accounting	E-mail Account	Description	Bank Accounts	Attributes	Attachments	Change History														
Code:	Anna Smith			Last Name:	Smith			<input checked="" type="checkbox"/> Active															
First Name:	Anna			WWW:																			
SSN:	Enter employ...			Card Number:																			
Addresses																							
								<input checked="" type="checkbox"/> Only active															
ID	Address Type	Code	Name	Address	Default	Active																	
13	Main			1322 Timber Oak Drive , Dalhart, Texas	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>																	
Address Type: Main Code: <input type="text"/>																							
Name: <input type="text"/>				Contacts Consents To Personal Data Processing Description																			
Country: United States of America				<table border="1"> <thead> <tr> <th>ID</th> <th>Type</th> <th>Number</th> <th>Archiving ...</th> <th>Default</th> <th>Active</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td colspan="7"> </td> </tr> </tbody> </table>						ID	Type	Number	Archiving ...	Default	Active	Notes							
ID	Type	Number	Archiving ...	Default	Active	Notes																	
State: Texas																							
Street: Timber Oak Drive																							
Street No.: 1322 Apt/Unit No.: <input type="text"/>																							
City: Dalhart																							
Zip Code: <input type="text"/> Post Office: <input type="text"/>																							
District: <input type="text"/>																							
County: <input type="text"/>																							

## Tab General

The tab *General* contains the following fields and parameters:

- **Code** – mandatory field
- **First Name** – mandatory field
- **Last Name** – mandatory field
- **Create operator** – checking the parameter automatically creates an <<operator's account>> associated with defined employee. Next to the parameter, there is a drop-down list allowing for selecting operator type. Values available on the list: [Internal](#), [External](#), [General](#).
- **Active** – if the parameter is checked, an employee can be used in other places of the system
- **SSN**
- **WWW**
- **Card Number** – number of employee's electronic card Numbers of cards used by employees must be unique. If card number is provided, then, when logging-in to the system, it will be possible to scan its barcode and the system will automatically suggest the user's login. In

order to be able to use that function, it is necessary to uncheck parameter *Use integrated security* in the login window

In the section *Addresses*, it is possible to add employee's addresses. The following types of addresses are available:

- **Main**
- **Delivery**
- **Subsidiary**
- **Mailing**
- **Billing**
- **Residence**

The list of addresses contains default address of *Main* type generated by the system and it can be freely modified by the user, however it cannot be deleted. The user can add any number of employee's addresses but only one of them can be marked as default. If the parameter *Active* placed next to an address is checked, it means that such address can be used in other places of the system. Addresses can be deactivated (archived) manually by unchecking the parameter *Active*. If an address, which has already been used in the system, gets modified on the form of an employee or on a document, it is automatically archived by the system.

#### Note

An address marked as default for the main type cannot be deactivated or deleted. Also, the addresses which have already been used in the system (e.g., on a document) cannot be deleted.

#### Note

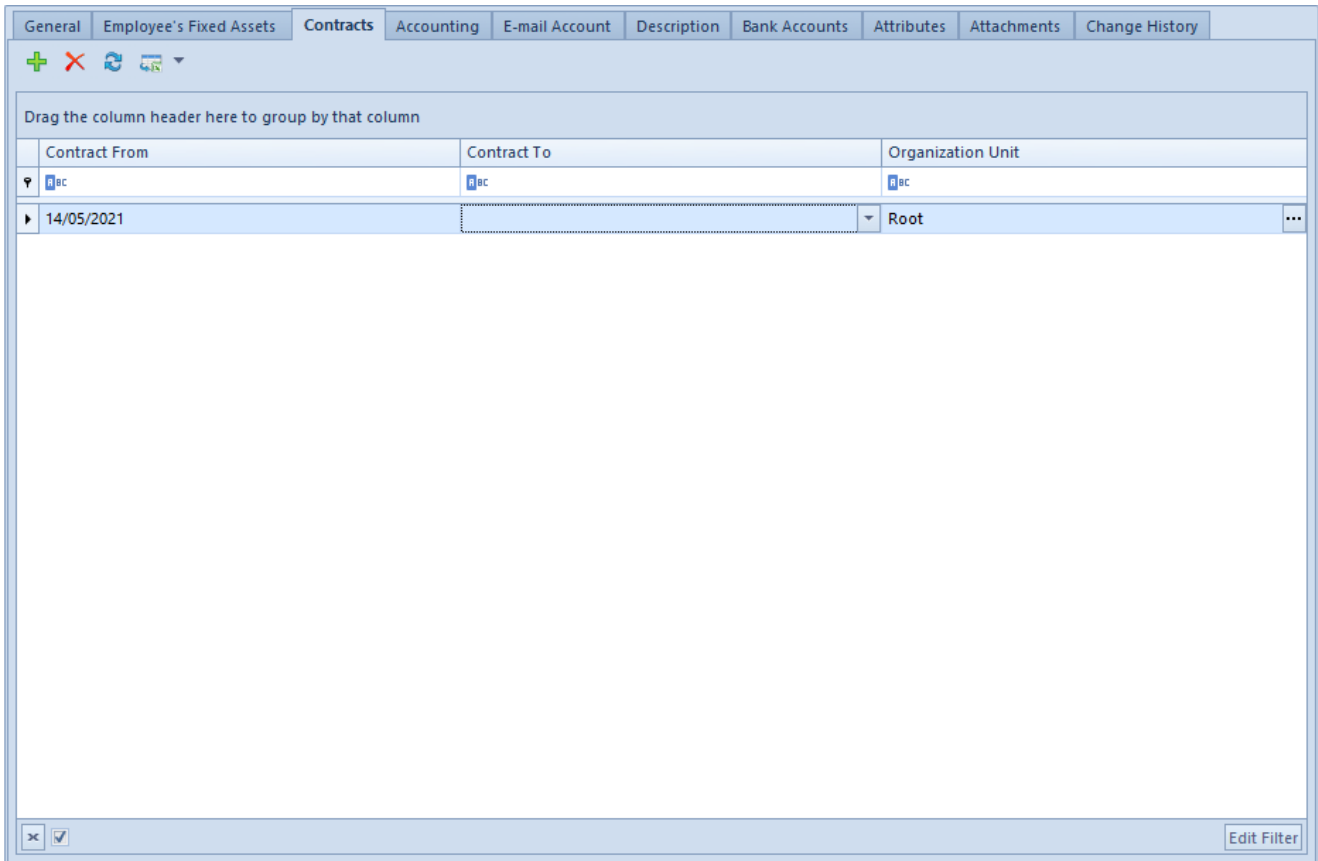
Deactivation of an address is irreversible.

Subtab *Contacts* contains contact data of an employee (e.g., phone number, e-mail, messenger) and allows for adding it for each address.

Subtab *Consent To Personal Data Processing* contains the list

of consents to processing of employee's personal data and allows for adding them. Consents to personal data processing are described in <<article>>.

## Tab *Contracts*



### Tab *Contracts*

In the tab *Contracts*, the user can add, delete and edit the following information related to employee's contracts:

- **Contract From** – contract start date
- **Contract To** – contract end date
- **Organization Unit** – organization unit the employee is assigned to. The organization unit is selected from the list of available organization units which is opened upon clicking the [...] button. Organization units are added from the level of *Configuration* → *Company Structure* → *Subordination Structure*.

# Tab *E-mail Account*

The screenshot shows a software interface with a tabbed menu at the top. The tabs are: General, Employee's Fixed Assets, Contracts, Accounting, E-mail Account (selected), Description, Bank Accounts, Attributes, Attachments, and Change History. Below the tabs, there are five input fields: Host (empty), Port (25), Login (empty), Password (empty), and Signature (a large empty text area with a vertical scrollbar on the right).

## Tab E-mail Account

The tab *E-mail Accounts* allows for defining employee's e-mail account. It contains the following fields:

- **Host** – e-mail server to which an employee logs
- **Port** – outgoing e-mail server number. Most of e-mail servers has port No. 25, thus, this number is entered by the system by default. However, it can be changed freely.
- **Login**
- **Password**
- **Signature** – in this field, it is possible do specify employee's default signature for sent e-mails.

## Other tabs

The tab *Accounting* presents default bookkeeping accounts

assigned to a given employee.

The subtab *Description* allows for entering additional information regarding an employee.

The tab *Bank Accounts* presents a list of bank accounts assigned to an employee and allows for adding/editing/deleting them.

Detailed description of the tabs *Attributes* and *Attachments* can be found in article <<*Tab Discount Codes, Analytical Description, Attributes, Attachments and Change History*>>.