

Employee Management - Employees - Load a New Employee

Print

Summary

This guide will assist you to load a new employee within the Sage 300 People system.

Description

There are two ways in which you can add a new employee. You can add the employee directly as a new employee, or you can add the employee as a recruit.

When adding a new employee, you must complete the following screens:

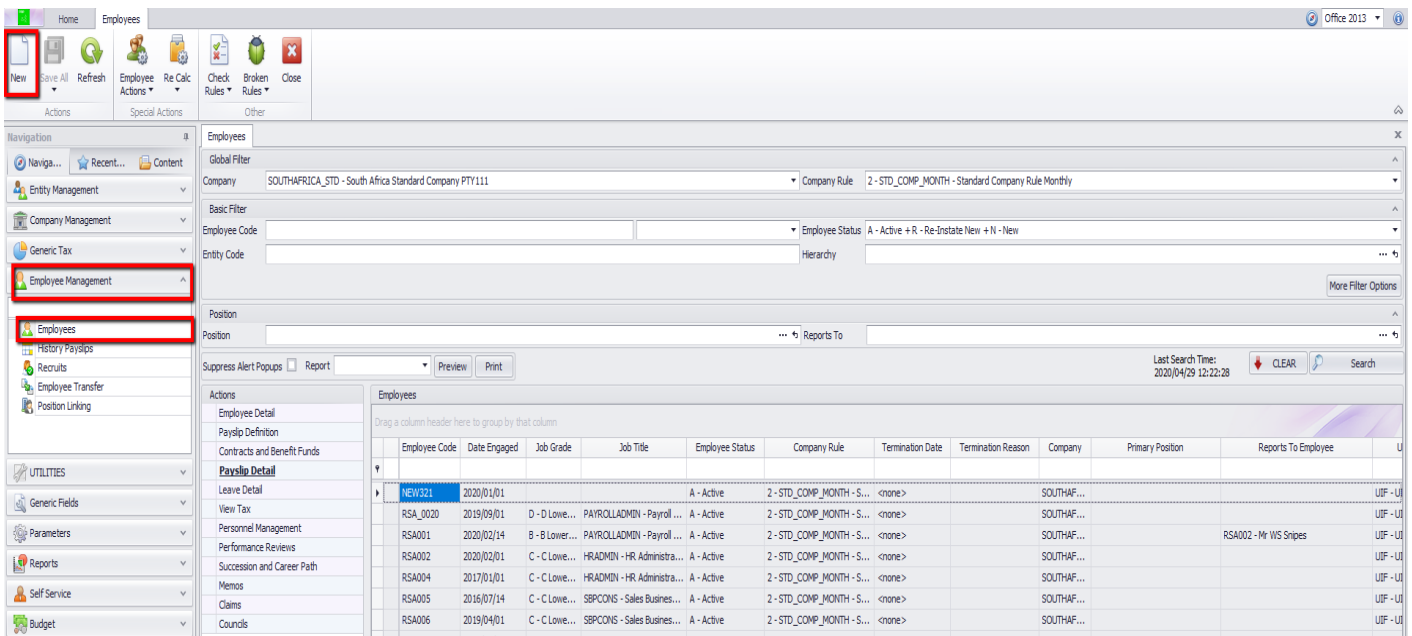
- Employee Detail screen:
 - o Employee Detail,
 - o Basic Information, and
- Payslip Definition screen.

A checklist will display when adding a new employee. The checklist indicates the information on the different screens that must be completed before you can save the employee record. You can also click the hyperlinks to navigate to the applicable screen.

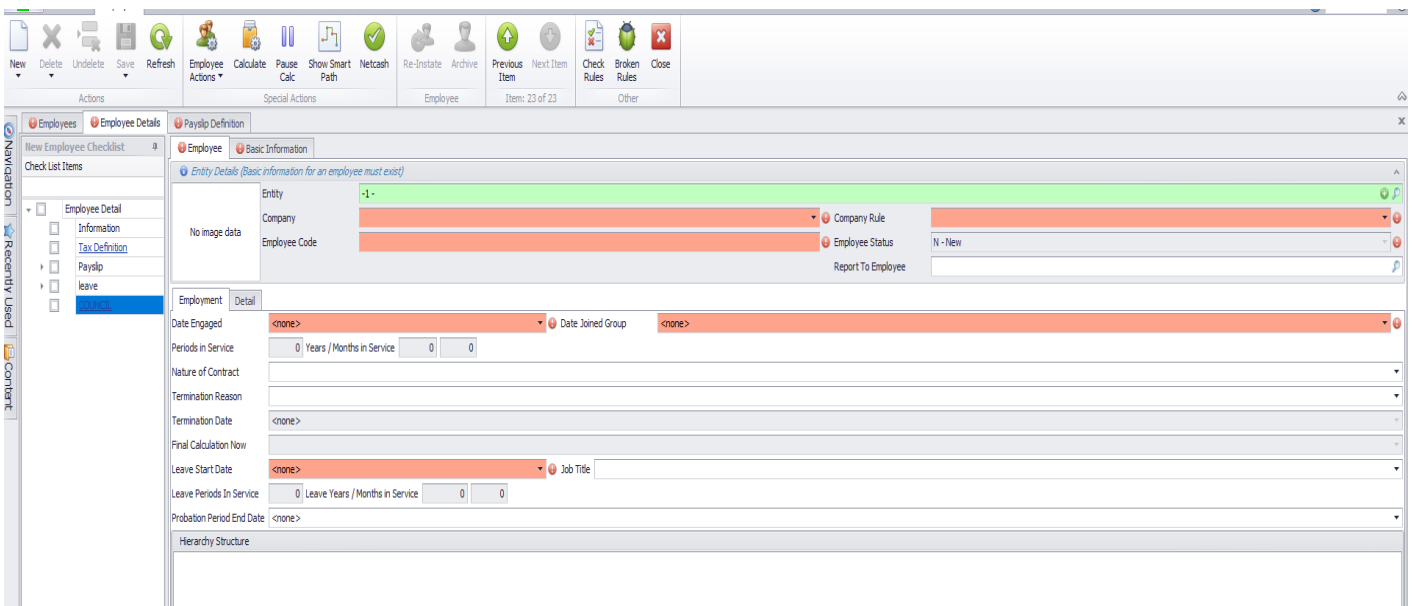
Resolution

From the Navigation pane:

Expand **Employee Management**
Double-click on **Employees**
Select **New**



When adding an employee the mandatory information that needs to be populated will be flagged in red:



Employee

- Company
- Company Rule
- Employee Code
- Date Engaged
- Date Joined Group
- Leave Start
- Rule
- Tax Definition - Tax Status
- Leave Policy

Basic Information

- Title
- Initials
- First Name
- Last Name
- Birth Date
- Gender
- Racial Group
- Contact - Work Number

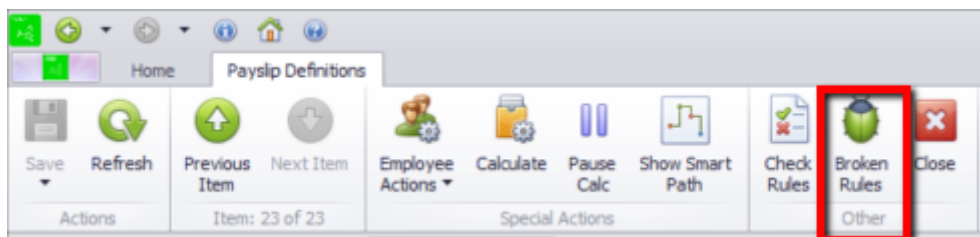
The screenshot displays the 'Employee Details' and 'Payslip Definition' tabs. The 'Employee Details' tab includes fields for Employee Code (RSA098), Company (SOUTHAFRICA_STD - South Africa Standard Company PTY111), and Employee Status (N - New). The 'Payslip Definition' tab shows fields for Date Engaged (2020/04/01), Date Joined Group (2020/04/01), and Leave Start Date (2020/04/01). A 'Hierarchy Structure' list is visible at the bottom, including items like ESS - ESS, OLDMUTUALBRANCH - OLD MUTUAL BRANCH, and OLDMUTUALCAT - OLD MUTUAL CATEGORY.

Once all employee and Basic Information fields have been completed navigate to the Payslip Definition screen.

- Link the Payment Run Definition
- Link the Affected Earning Line
- Add the Earnings, Deductions, Company Contributions and Fringe Benefits if the employee is not linked to a Remuneration Structure, if the employee is linked to a Remuneration Structure the Earnings, Deduction, Company Contributions will default:

The screenshot displays the 'Payslip Definitions' screen. The 'Pay Run Details' tab shows a table with columns for Pay Run Defn, Payment Run Defn, Bank Detail, Net Pay Split, Status, Remuneration Type, Remuneration Amount, Affected Earning Line, Apply Minimum, and Minimum. The 'Earnings' tab shows a table with columns for Display Priority, Earning Defn, Short Description, Emp Calculation Status, Earning Calcula..., Status, Reference, Note, Fixed, Recurrence Amount, Recurrence Type, Include In Package, Balance, Figures Exist, and Auto Generated.

If you all fields have been completed and you are still unable to save please access the Broken Rules button on the ribbon,



Refer to any errors that might need your attention.

Broken Rules		
Record 1 of 4		
<input checked="" type="checkbox"/> Errors <input type="checkbox"/> Warnings <input type="checkbox"/> Information <input type="checkbox"/> Security Refresh		
Object Name	Code	ErrorType
Employee	RSA098 - STD_COMP_MONTH (New)	
RSA098 - STD_COMP_MONTH (New)		
Employee Status		1 - Validation Error
Status cannot be : New. Payslip definitions are invalid or required for a New status.		
Employee Equit...	Employee Equity Information [-1]	
Employee Equity Information [-1]		
Occupation...		2 - Validation Warning
A value for Occupational Category is recommended to generate the Equity Plan.		
Occupation...		2 - Validation Warning
A value for Occupational Level is recommended to generate the Equity Plan.		
Workplace		2 - Validation Warning
A value for Workplace is recommended to generate the Equity Plan.		
Province		2 - Validation Warning
A value for Province is recommended to generate the Equity Plan.		
Equity Job ...		2 - Validation Warning
A value for Equity Job Function is recommended to generate the Equity Plan.		
Employee Skills...	Employee Skills Information [-1]	
Employee Skills Information [-1]		
OFO Categ...		2 - Validation Warning
A value for OFO Category is recommended to generate the Skills Plan.		
OFO Code		2 - Validation Warning
A value for OFO Code is recommended to generate the Skills Plan.		
Occupation...		2 - Validation Warning
A value for Occupational Category is recommended to generate the Skills Plan.		
Occupation...		2 - Validation Warning
A value for Occupational Level is recommended to generate the Skills Plan.		
Workplace		2 - Validation Warning
A value for Workplace is recommended to generate the Skills Plan.		
Province		2 - Validation Warning
A value for Province is recommended to generate the Skills Plan.		
Municipality		2 - Validation Warning
A value for Municipality is recommended to generate the Skills Plan.		
Payslip Definition	Main Payrun	
Main Payrun		
Affected Earni...		1 - Validation Error
This is a mandatory field		
Entity	-1 - Miss Bobby Swagger	
-1 - Miss Bobby Swagger		
Tax No		2 - Validation Warning
Tax Number is not filled in		
ID Number		2 - Validation Warning
ID Number is not filled in		
Payslip Definition	Main Payrun	
Main Payrun		
Affected Earni...		1 - Validation Error
This is a mandatory field		

Once you have inserted the necessary information then you will select **Save**.

