

MOYO

Driving Significance Together

User Manual

PROCION SYSTEM ONLINE

Date: 8TH Month 2023

Submitted by: MOYO

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Administration section

Employee:

Edit Employee:

Step 1 Navigate to Employee screen:

Navigate to the Employee Screen by clicking on the “Administration” button on the top navbar or on the “Administration” button on the home screen:

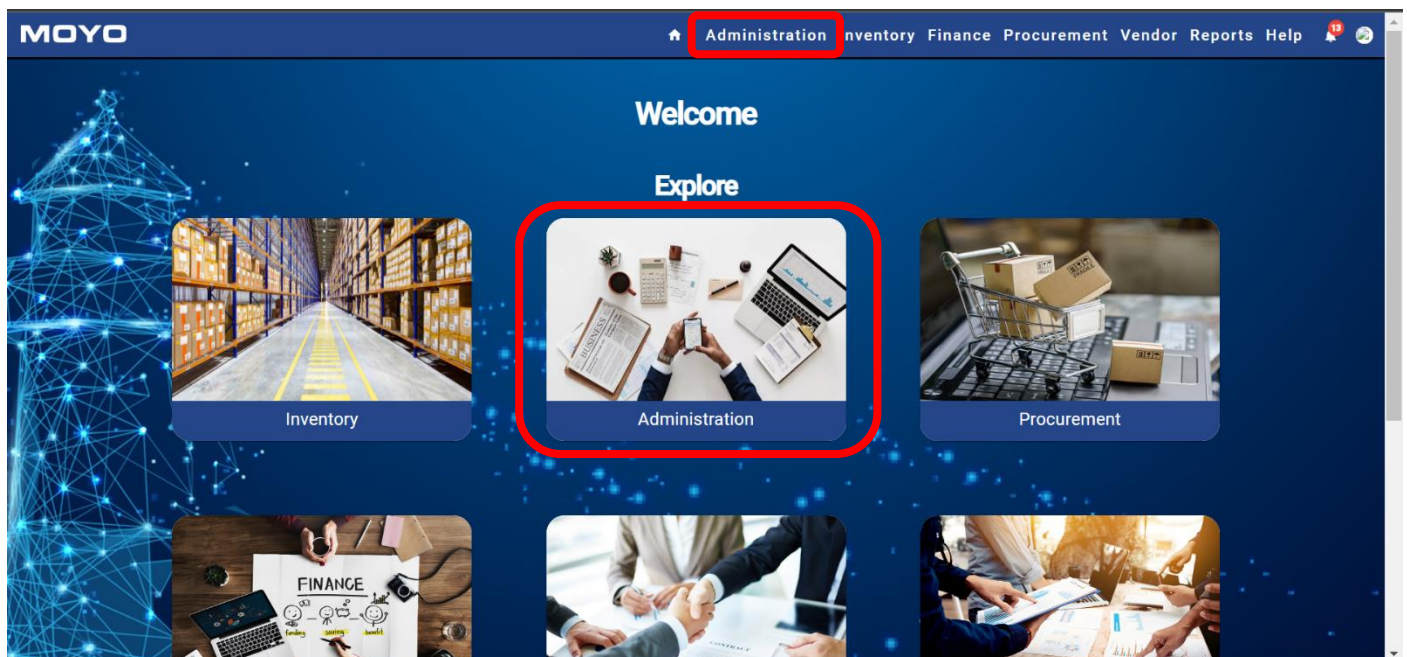


Figure 1 Home Screen to Employee Screen.

Then Click on the “Employee” button on the administration side navbar:



MOYO Administration Inventory Finance Procurement Vendor Reports Help

Administration

- Employees**
- Admins
- Roles
- Departments
- Branch
- Delegation of Authority
- Mandate Limits
- Manage Help
- Audit Log
- Settings

Manage Employees ?

Create Employee

Search by Name

Name	Surname	Username	Email	Phone Number	Role	Branch	Department	Mandate Limit	Edit	Delete	Delegate Authority
Leon	Combrinck	LeonCombrinck765	leon.rigel324@gmail.com	0987654321	MD	Pretoria	BE	R10,000.00	Edit	Delete	Delegate Authority
Emil	Won	EmilWon098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R10,000.00	Edit	Delete	Delegate Authority
John	Doe	JohnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00	Edit	Delete	Delegate Authority
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00	Edit	Delete	Delegate Authority
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00	Edit	Delete	Delegate Authority
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00	Edit	Delete	Delegate Authority

Figure 1 Admin Side Nav to Employee Screen.

Step 2 Edit Employee:

Edit an employee by clicking on the “edit” button on the employee screen within the employee table: (The row you chose is the employee you will be editing)

MOYO Administration Inventory Finance Procurement Vendor Reports Help

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John	Doe	JohnDoe765	leon.rigel324@gmail.com	0987654321	Employee	Cape Town	Finance	R10,000.00	Edit	Delete	Delegate Authority
Luke	Theman	LukeTheman098	leon.rigel324@gmail.com	0760980987	Employee	Cape Town	Finance	R10,000.00	Edit	Delete	Delegate Authority
Proc	Emp	ProcEmp098	leon.rigel324@gmail.com	0760980987	Employee	Pretoria	BE	R200,000.00	Edit	Delete	Delegate Authority
ProcEmp	Ex	ProcEmpEx098	leon.rigel324@gmail.com	0760980987	MD	Pretoria	BE	R200,000.00	Edit	Delete	Delegate Authority

Figure 1 Click Edit Employee Button.

This will navigate you to the “Edit Employee” screen where you will be able to Edit the “Employee Information” and the “Employee Access”. Click on the “Employee Information” tab to edit the employee information. (All Details are prefilled)



The screenshot shows a web interface for editing employee information. At the top, there are two tabs: 'Employee Information' (highlighted with a red box) and 'Employee Access'. Below the tabs is the title 'Edit Employee Information?'. The form is divided into two columns. The left column contains fields for 'Name' (with value 'Luke'), 'Email' (with value 'leon.rigel324@gmail.co'), 'Role' (a dropdown menu with 'Employee' selected), and 'Department' (a dropdown menu with 'Finance' selected). The right column contains fields for 'Surname' (with value 'Theman'), 'Phone Number' (with value '0760980987'), 'Mandate Limit' (a dropdown menu with '10000' selected), and 'Branch' (a dropdown menu with 'Cape Town' selected). Each field has a placeholder text indicating character limits or instructions. At the bottom, there are two buttons: 'Save' (highlighted with a green box) and 'Cancel'.

Figure 1 Click Employee Information Tab.

1. **"Name"**: Change the name of the employee you want to add. (Not Compulsory)
2. **"Surname"**: Change the surname of employee you want to add. (Not Compulsory)
3. **"Email"**: Change the email of the employee you want to add. (Not Compulsory)
4. **"Phone Number"**: Change the phone number of the employee you want to add. (Not Compulsory)
5. **"Role"**: Change a role for the employee from the list existing roles on the system. (Not Compulsory)
6. **"Mandate Limit"**: Change a mandate limit for the employee from the list existing mandate limits on the system. (Not Compulsory)
7. **"Department"**: Change a department for the employee from the list existing departments on the system. (Not Compulsory)
8. **"Branch"**: Change a Branch for the employee from the list existing Branches on the system. (Not Compulsory)



You Can Alternatively create a new department of a specific branch by clicking on the “+” button next to the department label. (*Note this can only appear once a branch is selected)

Employee Information

Employee Access

Edit Employee Information ?

Name:

Leon

Not more than 32 characters long.

Surname:

MD

Not more than 50 characters long.

Email:

leon.rigel324@gmail.co

Phone Number:

0983528462

Please include spaces as shown in the placeholder.

Role:

Choose one*
MD

Mandate Limit:

Choose one*
10000

Employee spend limit.

Branch:

Choose one*
Pretoria

Department

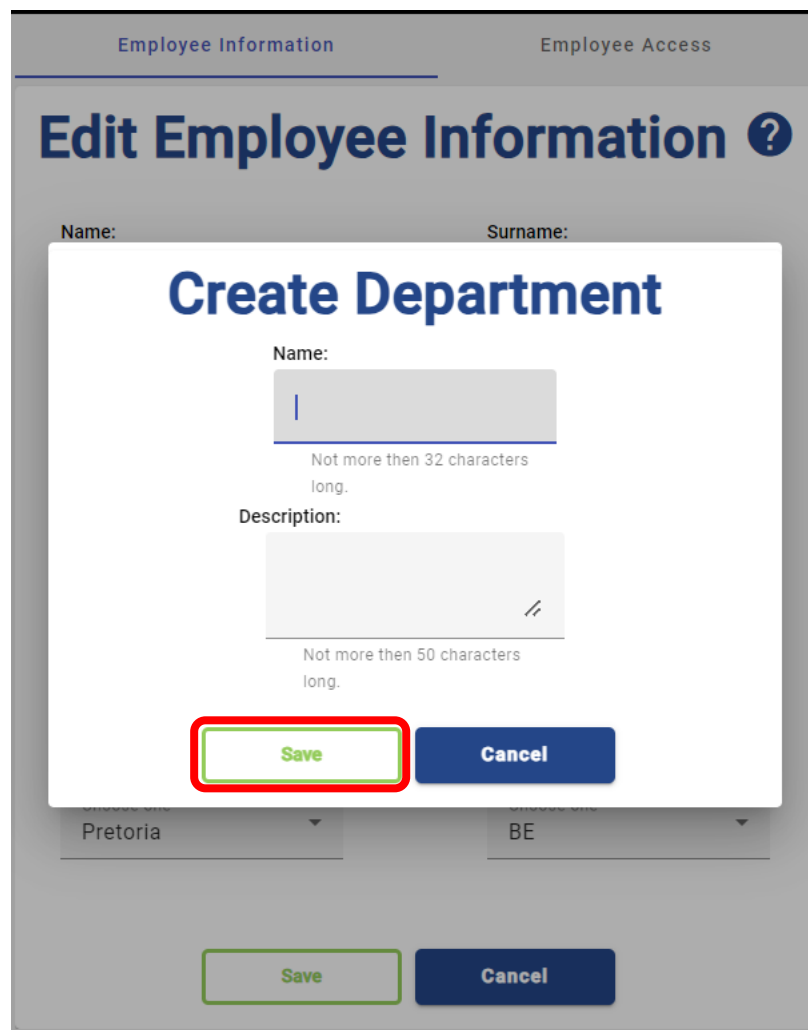
Choose one*
BE

Save

Cancel

This will navigate you to the create department screen where u will be able to create a new department for that specific branch within the edit employee screen. Click on the “Save” button to create the new department. (*Note this can only appear once a branch is selected)





The screenshot shows a web interface for 'Edit Employee Information'. At the top, there are tabs for 'Employee Information' and 'Employee Access'. The main heading is 'Edit Employee Information' with a help icon. Below this, there are input fields for 'Name:' and 'Surname:'. A modal window titled 'Create Department' is open in the center. It contains a 'Name:' input field with a character limit of 32, and a 'Description:' text area with a character limit of 50. At the bottom of the modal, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red rectangle. Below the modal, there are dropdown menus for 'Pretoria' and 'BE', and another set of 'Save' and 'Cancel' buttons at the very bottom.

1. "Name": Fill in the name of the department. (Compulsory)
2. "Description": Fill in the description of the department. (Compulsory)



Click on the “Employee Access” tab to edit the employee access rights. (Access can only be True or False) (All Details are prefilled)

The screenshot shows a web interface for editing employee access. At the top, there are two tabs: 'Employee Information' and 'Employee Access'. The 'Employee Access' tab is selected and highlighted with a red rectangular border. Below the tabs is the title 'Edit Employee Access' in a large, bold, blue font. The form consists of several rows of dropdown menus, each with a label and a 'Choose one*' placeholder. The labels and their corresponding dropdown values are:

- Can Access Inventory: False
- Can Access Finance: False
- Can Access Procurement: False
- Can Access Vendor: False
- Can Access Reports: False
- Can Approve Vendors: False
- Can Edit Vendors: False
- Can Delete Vendors: False
- Can View Pending Procurement Requests: False
- Can View Flagged Procurement Requests: False
- Can View Finalised Procurement Requests: False

Figure 1 Click Employee Access Tab.

1. **“Can Access Inventory”**: If true this allows the employee to be able to access the inventory section of the system. (Not Compulsory)
2. **“Can Access Finances”**: If true this allows the employee to be able to access the finance section of the system. (Not Compulsory)
3. **“Can Access Procurement”**: If true this allows the employee to be able to access the procurement section of the system. (Not Compulsory)
4. **“Can Access Vendor”**: If true this allows the employee to be able to access the vendor section of the system. (Not Compulsory)
5. **“Can Access Reports”**: If true this allows the employee to be able to access the reports section of the system. (Not Compulsory)
6. **“Can Approve Vendor”**: If true this allows the employee to be able to access the vendor section of the system and be able to approve a vendor on the system. (Not Compulsory)



7. **“Can Edit Vendor”**: If true this allows the employee to be able to access the vendor section of the system and be able to edit a vendor on the system. (Not Compulsory)
8. **“Can Delete Vendor”**: If true this allows the employee to be able to access the vendor section of the system and be able to delete a vendor on the system. (Not Compulsory)
9. **“Can View Pending Procurement Requests”**: If true this allows the employee to be able to access the procurement section of the system and be able to view all pending procurement requests on the system, which includes approving and rejecting of a procurement request. (Not Compulsory)
10. **“Can View Flagged Procurement Requests”**: If true this allows the employee to be able to access the procurement section of the system and be able to view all flagged procurement requests on the system, which includes approving and rejecting of a flagged procurement request. (Not Compulsory)
11. **“Can View Finalised Procurement Requests”**: If true this allows the employee to be able to access the finance section of the system and be able to view all unfinalized procurement requests on the system, which includes being able to finalise a procurement request. (Not Compulsory)

Click on the “Save” button to save the changes of the edited employee. Navigate back to the “Employee Information” tab and click the “Save” button.

The screenshot shows a web interface for editing employee information. At the top, there are two tabs: 'Employee Information' (which is selected and highlighted with a red box) and 'Employee Access'. Below the tabs is the title 'Edit Employee Information?'. The form is divided into two columns. The left column contains fields for 'Name' (with the value 'Luke'), 'Email' (with the value 'leon.rigel324@gmail.co'), 'Role' (a dropdown menu with 'Employee' selected), and 'Department' (a dropdown menu with 'Finance' selected). The right column contains fields for 'Surname' (with the value 'Theman'), 'Phone Number' (with the value '0760980987'), 'Mandate Limit' (a dropdown menu with '10000' selected), and 'Branch' (a dropdown menu with 'Cape Town' selected). At the bottom of the form, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

Figure 1 Click Save Edit Employee Button.

