

Knowledge Base



Introduction

Employees and Contractors are referred to in the knowledge base collectively as “workers”.

An “employee” is defined by being set up as an employee in your Xero file. All registered employees in your Xero file with a valid email address set in Xero will be imported into Gojee automatically.

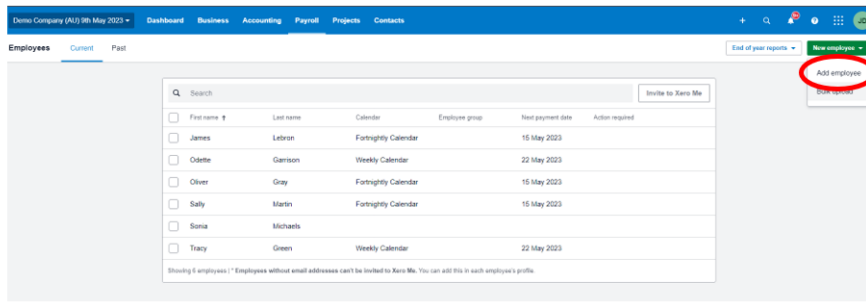
Contractors on the other hand, do not get pulled from, or stored in Xero. They live only in Gojee. This means that only employees times will be sent to Xero as timesheets, and not contractors. However you can report on contractors times as well in Gojee.

Refer to [Reports](#) section for more information.

Add Employees

To add an employee into the system, follow these steps:

- Navigate to the Employee section from the Payroll menu in your Xero file
- Click on the green New Employee button and select Add Employee



- Complete all the required fields and ensure you add an email address for the employee
- Go to your My Accounts page in Gojee from the top right dropdown
- Select Sync Now > All
- Go to HR Management, then Manage Staff and Contractors. You'll be presented with the Staff page showing all of your workers.

Staff Members **Active** **Deactivated** **Archived** Add Actions

Name	Surname	E-mail	Roles		
James	Lebron	jl@madeup.email.com	Customer Job Staff	Open Action	Open Action
Jimmy	Oliver	jimmy@me.com	Sales Representative	Open Action	Open Action
Odette	Garrison	ogg@madeup.email.com	Customer Job Staff	Open Action	Open Action
Oliver	Gray	og@madeup.email.com	Customer Job Staff	Open Action	Open Action
Olivia	Smith	olivia@me.com	Customer Job Staff	Open Action	Open Action
Sally	Martin	sm@madeup1993.com	Customer Job Staff	Open Action	Open Action
Sonia	Michaels	son@madeup1993.com	Customer Job Staff	Open Action	Open Action
Test	New Employee	tim@me.com	Non user	Open Action	Open Action
Tony	Brown	tony@me.com	Customer Job Staff	Open Action	Open Action
Tracy	Green	tg@madeup.email.com	Customer Job Staff	Open Action	Open Action

Records to display on page: 20

Your staff member will now show in the list as imported into the staff page with a Xero Active status.

Add Contractors

To add a contractor, or a non-Xero employee into your Gojee file, Go to HR Management, then Manage Staff and Contractors. From this page you can click on the green **Add** button to enter the data for the worker.

Staff Members **Active** **Deactivated** **Archived** Add Actions

Name	Surname	E-mail	Roles		
James	Lebron	jl@madeup.email.com	Customer Job Staff	Open Action	Open Action
Jimmy	Oliver	jimmy@me.com	Sales Representative	Open Action	Open Action
Odette	Garrison	ogg@madeup.email.com	Customer Job Staff	Open Action	Open Action
Oliver	Gray	og@madeup.email.com	Customer Job Staff	Open Action	Open Action
Olivia	Smith	olivia@me.com	Customer Job Staff	Open Action	Open Action
Sally	Martin	sm@madeup1993.com	Customer Job Staff	Open Action	Open Action
Sonia	Michaels	son@madeup1993.com	Customer Job Staff	Open Action	Open Action
Test	New Employee	tim@me.com	Non user	Open Action	Open Action
Tony	Brown	tony@me.com	Customer Job Staff	Open Action	Open Action
Tracy	Green	tg@madeup.email.com	Customer Job Staff	Open Action	Open Action

Records to display on page: 20

Staff Details

First Name

Steve

Last Name

Smith

Contact E-mail Address

Steve@me.com

Cost per hour

\$ 80.00

Linked Professions

Search Profession

Roles

Non user

User

Add

Cancel

- First and Last Name (***Required fields**): Enter the name of the worker.
- Email (***Required fields**): Enter the email of the worker.
- Cost per hour (***Required fields**): Enter the cost per hour of the worker. This field is used when this worker records time in the system to calculate the cost of the time spent. Its recommended that this cost includes all relevant overheads (i.e. super, allowances etc) unless theses are added as costs on the jobs separately.
- Linked Professions: Select one or more Professions from the list. This creates the relationship between the worker and the tasks they can perform.

Note: You will need to have first set up Professions in your Gojee file to be able to select them from this list. If you haven't yet created them you can save the new worker and come back and add it later. Refer to the [Add Professions](#) section for more information.

- Roles: This is where you can choose if this worker will have access to the Gojee system, and in what capacity they can use the system. This is detailed in the following section, and as this isn't a required field, you can save the new worker and come back and assign the role later.

Assign Roles for Workers

To add a role for workers, simply click on the person from the list on the Manage Staff and Contractors page and then click on the User tab and the following information will be displayed:

Roles

Non user
User

Log in E-mail Address

tony@me.com

☐ Administrator ?

☒ Customer job module ?
☒ Contractor ?
☒ Customer Job Staff ?
☐ Sales Representative ?
☐ Receiving ?
☐ Customer Job Manager ?

☒ Resource module ?
☒ View Inventory ?
☐ Core Resources ?
☐ Staff and Contractors ?
☐ Resource Manager ?

☒ Timesheet module ?
☒ Entry ?
☐ Timesheet Manager ?

Save
Cancel

- Login Email Address (***Required fields**): This will default to the email entered in the field at the top of the page. You can edit this before creating the role, and once the role is created, this will be the email address the worker will use to login to Gojee.

Note: Once this role is created, **the email address to login to Gojee cannot be edited**, so please ensure it is correct. For Xero employees, this will default to the email address for the employee in the Xero file. As such, it can possibly be the worker's personal address if not changed.

It may be wise to consider the best email address for the user to use to login to Gojee and edit it accordingly prior to saving.

Roles groups:

There are three main role groups and an administrator role. The Administrator role can do all functions in the system, the other roles can combine to enable users to do a range of different functions in the system.

- **Customer Job Module:**
 - Contractor: Enable user to execute customer jobs already set up and assigned to them, as well as being able to track their own time.
 - Customer Job Staff: Enable user to execute customer jobs already set up and assigned to them, track their own time and start timers on any jobs they have the correct profession for,

as well as record consumables used on jobs.

- Sales Representative: Enable user to manage customer jobs and view assets, clients, inventories, products and professions.
- Receiving: Enable user to view purchase orders and create goods receipts.
- Customer Job Manager: Enable user to view the job profit and manage customer products.
- **Resource module:** Roles relating to creation and editing of resources including Staff, Inventory, Assets Etc.
 - View Inventory: Enable user to view inventory.
 - Core Resources: Enable user to manage assets, inventory, profession, customers and suppliers.
 - Staff and Contractors: Enable users to create, view and edit staff including access to sensitive payroll information.
 - Resource Manager: Enable user to manage assets, inventory, profession, staff, customers and suppliers.
- **Timesheet Module**
 - Entry: Enable user to record their own times via Bulk Time Entry.
 - Timesheet Manager: Enable user to review timesheets and post to Xero.

Note: Roles can be combined, so for example a worker could be assigned the View Inventory and Sales Representative role at the same time.

View and Edit

To view and edit employees and contractors in Gojee, from the Navigation Dashboard you can navigate to **HR Management** and use **Manage Staff and Contractors**.



To edit one of the workers, simply click on the row and the fields will be displayed to edit the information. Refer to the section Add a contractor into Gojee (provided above) for details on what the fields are and how to edit them.

Importing Data

Importing from CSV files

This process should be used when you'd like to import a bulk list of contractors, or if you'd like to make bulk changes to contractors previously imported into Gojee.

The import process uses the email address to assess whether the contractor is new, or already exists. Hence, changes to email addresses cannot be made in bulk, but all other asset fields can be updated.

To start an import, navigate to **HR Management** and **Manage Staff and Contractors**. Click on the **Actions** button at the top right of the page and select **Import/Update from CSV**. You will be presented with the following modal:



Import staff list from CSV ×

Select File No file selected.

1. Download import template
Start by downloading our CSV (Comma Separated Values) template file. This file has the correct column headings gojee needs to import details of your items.
↓ [DOWNLOAD TEMPLATE FILE](#)

2. Copy your items into the template
Using Excel or another spreadsheet editor, fill the gojee template with the details of your items. Make sure the item details match the column headings provided in the template.

Important: Do not change the column headings in the template file. These need to be unchanged for the import to work in the next step.

Any staff that already exist (same email) in gojee will be updated. Any new staff will be created in gojee.

3. Import the updated template file
Save your updated template as .csv file and then click on the 'Select File' button at the top of the page to import your items into gojee.

Note: Once you select the file, an option to 'Upload' will appear at the top of the page. If there are no errors, the import will proceed. This action cannot be cancelled or reversed.

Exporting Data

This process will export all your contractors to a csv file.

To run the export, navigate to **HR Management** and **Manage Staff and Contractors**. Click on the **Actions** button at the top right of the page and select **Export to CSV**. A CSV file will be generated and automatically downloaded – please check the download section of your browser.

Next: [Professions](#).