Staff – (Add - Edit)

This article describes how to Add a Staff Member to Katipolt. Once a Staff Member is added, you can Select/Enter/Edit the Staff Member's information.

NOTE: Adding a Staff member will generate the Staff member's Katipolt Username. The Staff Member's Username will be their Email Address (where any Password link will be sent to) plus the Company's Shortcode.

NOTE: The Staff member default is a Field User, which means they can access the Onsite Calendar App. If you want the User to access Katipolt, contact NZTG

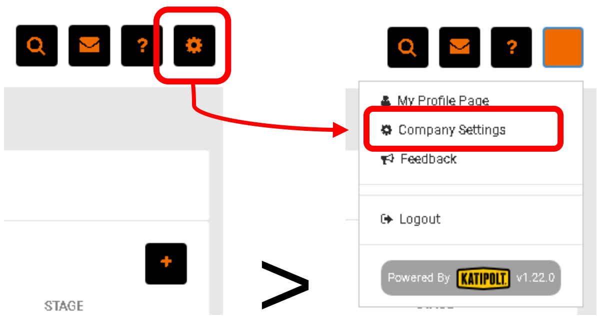
To Add or Edit a Staff Member;

Adding or Editing a Staff Member is done from the STAFF Subnav of Company Settings.

Quick Flow;

Company Settings > **STAFF** > **[Add Staff]** > **CONTACT / HOME ADDRESS / USER INFORMATION** > **EMPLOYMENT DETAILS** > **BANKING DETAILS** > **EMERGENCY DETAILS** > **FILES** > **[Save]**

1. Press the **[Settings]** button to display the Options Menu, then Press the **Company Settings** option to display the Company Settings Window



2. Scroll down and Press the **STAFF** Subnav to expand, then Press the **[Add Staff]** button to display the STAFF MEMBER: NEW STAFF MEMBER Window

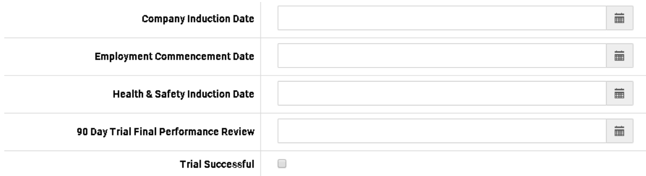
3. From the STAFF MEMBER: NEW STAFF MEMBER Window, Enter **CONTACT INFORMATION, HOME ADDRESS INFORMATION** and **USER INFORMATION**

NOTE: Fields with a red "*" are compulsory and must have an entry before saving

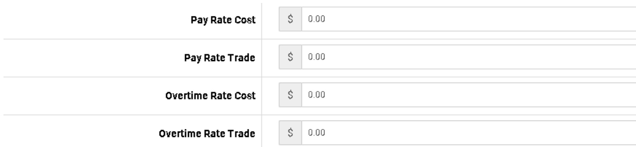
- Title – this is the User's title as appears on their business card
- **Labour Shortcode*** – Needs to be a unique 2-3-digit Alpha Code (letters only, no numerals) that will be added to the Katipolt Timesheet Codes to give the Staff Member's unique reference for Timesheets

4. Press the **EMPLOYMENT DETAILS** Subnav to expand, then Enter any Employment Details

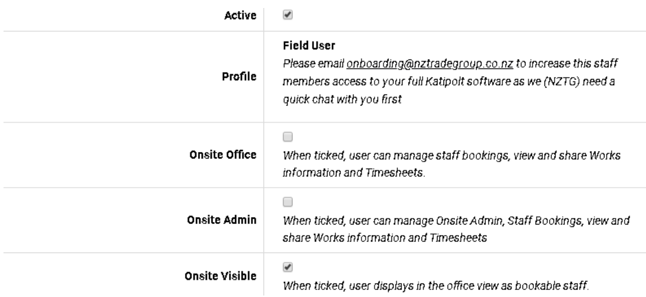
- Employment on-boarding **Dates** – Reference information
- **Trial Successful** – Reference information



- Pay/Overtime Rates* – **Cost**, your recovery cost to employ / **Trade** the default charge-out rate (**Must have a positive $ value entered**)

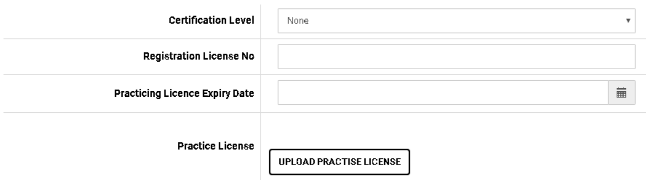


- **Active** – Ticked if an Active Staff Member
- **Profile** – Displays the Staff Member's permission level
- **Onsite Office** - Can see Onsite Calendar App (office) and make Labour Bookings
- **Onsite Admin** –
- **Onsite Visible** – Ticked, User displays in the Onsite Calendar App (office) as bookable staff

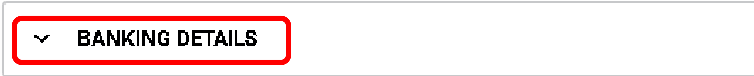


NOTE: The new User default is an Active / Profile "Field User" / Onsite Visible, which means they can login to the Onsite Calendar App (agent) from a mobile device, view their scheduled Work's Labour Bookings and Works details. Also View/Add any Attachments, Timesheets, or Site Notes.

- **Certification Level** – Reference information
- **Registration License No** – Used to populate ESC on Customer Invoices
- **Practicing Licence Expiry Date** – If current allows population to ESC
- **Practice License** [Upload Practicing Licence] - Reference information



5. Press the **BANKING DETAILS** Subnav to expand, then Enter any Staff Member Bank Details

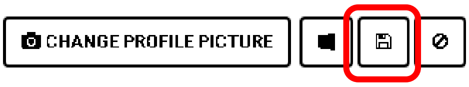


6. Press the **EMERGENCY CONTACT DETAILS** Subnav to expand, then Enter any Staff Member Emergency Contact Details

7. Press the **FILES** Subnav to expand, then Attach any Staff Member related Attachments

NOTE: MS Word, Excel, PDF's and JPG's can be uploaded to FILES

8. Scroll back up and to the top of the new Staff Member window and Press the **[Save]** button to save the entries



NOTE: On [Save] the new staff member's Username will display in the "Username" field of the CONTACT INFORMATION Section and the new Staff Member will be sent an Invitation email to where they can enter their User Password

NOTE: It may take a few minutes before the new staff member displays in TIimesheets *OR* Onsite Calendar

To Edit Staff information, from the STAFF Subnav, Press on that person's FULL NAME to open the person's STAFF MEMBER Window, Edit, then Press the [Save] button to save editing.