

## Staff – (Add - Edit)

This article describes how to Add a Staff Member to Katipolt (a Katipolt User). 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 their Password link will be sent to) plus the Company's Shortcode.

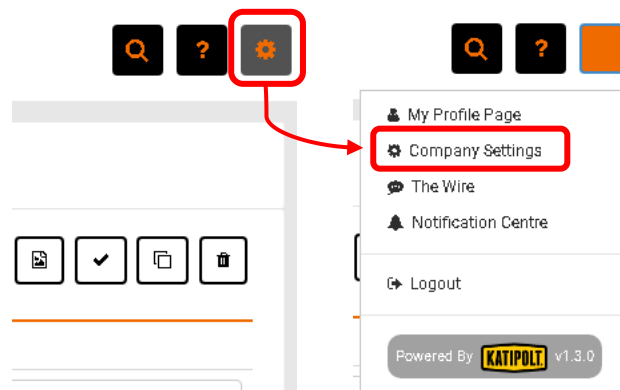
### To Add or Edit a Staff Member;


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

### Quick Flow;

**Company Settings > STAFF > [Add Staff] > CONTACT / HOME ADDRESS / USER INFORMATION > EMPLOYMENT DETAILS > BANKING DETAILS > EMERGENCY DETAILS > Attachments > [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 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 (**Should have “\$0” in as default**)
- **Active** – Ticked if an Active Staff Member
- **Profile** – Sets the permission level of the User in Katipolt
  - **Manager Plus** Can see all Katipolt Tabs plus financials
  - **Manager** – Can see all Katipolt Tabs
  - **Project Manager** – Can see Works Tab and Contacts Tab
  - **Field User** – Can see Dashboard Tab (their Agenda only) and My Profile Page
- 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

**NOTE:** To calculate the “Pay Rate Cost” or “Overtime Rate Cost” use the KAT – PAY RATE COST CALCULATOR

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

▼ BANKING DETAILS


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

▼ EMERGENCY CONTACT DETAILS

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


▼ ATTACHMENTS

**NOTE:** MS Word, Excel, PDF’s and JPG’s can be uploaded to ATTACHMENTS

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. An email with a link to the "Change Your Password" window will be sent to the User's email address, following the link, the new User enters and confirms their Katipolt Password

**NOTE:** It may take a few minutes before the new staff member displays in Tlimesheets OR Labour Bookings

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.