

Configure the section

Configure the [Employees] section

Version 8.0



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Configure the [Employees] section


PRODUCTS: ALL CREATIO PRODUCTS

Perform initial setup before working with the [*Employees*] section:

- Configure the list of job titles of your company employees.
- Configure the hierarchical structure of departments and divisions to display the company structure and career changes of the employees.


Configure job titles of employees

The staffing table of your company may be different from the staffing table of the other companies. Therefore, contact and employee positions are stored in separate lookups. To configure employee job titles according to your staffing table:


1. Open the System Designer by clicking  in the top right corner of the application window.
2. Click the “Lookups” link in the “System setup” block.
3. Select the [*Employees*] folder in the lookups section.
4. Open the [*Employee jobs*] lookup.
5. Add a new record to the lookup by clicking the [*New*] button.
6. Enter the job name and description.
7. Repeat steps 5 to 6 for all job titles in your company’s staffing table.

Configure the department structure of your company

Configure the hierarchical structure of departments and other structural units to keep track of the information about the company’s employees and their career movements. To do this, edit the records in the [*Organization structure items*] lookup. To configure the structure:

1. Open the System Designer by clicking  in the top right corner of the application window.
2. Click the “Lookups” link in the “System setup” block.
3. Select the [*Employees*] folder in the lookups section.
4. Open the [*Organization structure items*] lookup.
5. Add a new record to the lookup by clicking the [*New*] button.

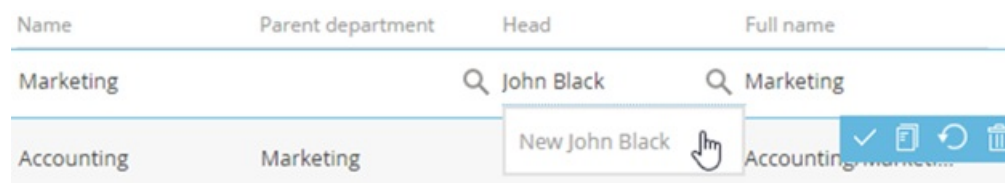
Note. Start adding company departments to the hierarchical structure from top to bottom. This will help to set links between the departments and form the full names of departments and divisions.

6. Enter the name of the organizational unit, for example, “Board of Directors.”
Specify the name of this organizational unit manager in the [*Head*] field. Click  and select the manager from the list of employees.

If the [*Employees*] section is empty, you can add a department head in two ways:

- Enter an employee name in the [*Head*] field. You will be prompted to create a record in the [*Employees*] section with a specified name (Fig. 1). A mini page of adding a record to the [*Employees*] department will open by clicking the prompt field. Fill out the contact page and click [*Save*]. The created contact will be specified in the [*Head*] field of the [*Organization structure items*] lookup.

Fig. 1 - Creating a new record in the [*Employees*] section from the [*Organization structure items*] lookup




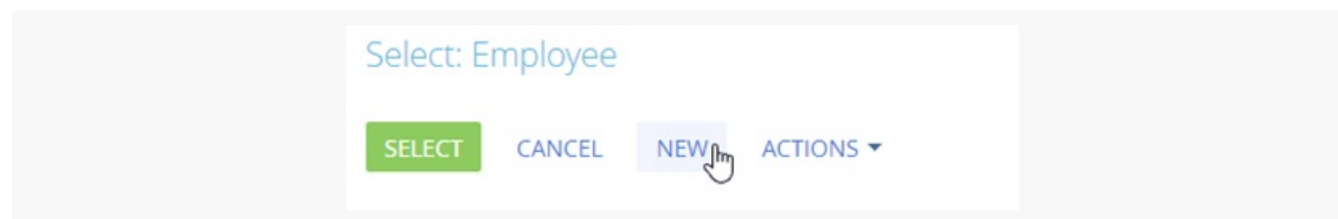
- Click , then click [*New*] in the window that opens (Fig. 2). A page for adding a new employee will open. Select the contact record to copy the contact data and communication options to the employee page. Specify an account, department, and position for the new employee. Save the page. As a result, a new employee will be specified as the department head in the [*Organization structure items*] lookup.

Fig. 2 - Adding a new record to the [*Employees*] section from the value selection window



7. Configure the status of the created department in the company structure by specifying the parent department.
8. Repeat steps 5 through 8 for all departments of your company.
9. The full name of the organizational unit will be generated automatically. The values of the [*Name*] and [*Parent department*] fields will be used in its name.

As a result, a full hierarchical structure of the company will be generated and displayed at the selection of the employee's organizational unit (Fig. 3). A manager's profile will be populated on the employee's page according to the information about an employee's organizational unit.

Fig. 3 - Organizational unit selection window of the employee's page

Select: Organization structure items

SELECT CANCEL ACTIONS ▾

Name ▾ **SEARCH**

Name ^

- Accounting
- Development
- Markeing
- Marketing
- Sales