

**This work instruction was last updated: 23<sup>rd</sup> March 2010**

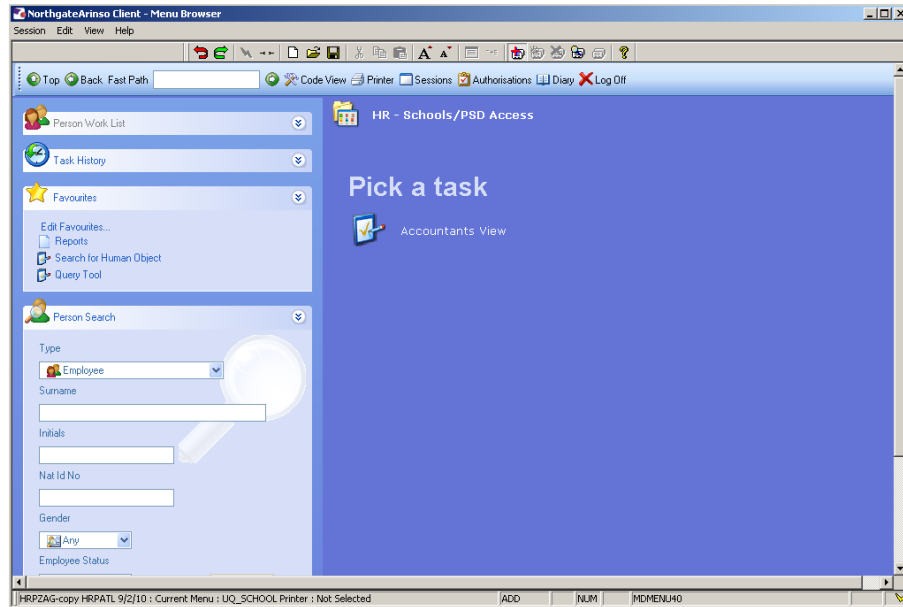
## **Accountant View**

This Work Instruction explains how to use the **Accountant View** task in ResourceLink to view staff personnel information.

- |   |  |
|---|--|
| 1 | Find a Staff Member Using Accountants View |
| 2 | Accountant View                            |
| 3 | Details Screen                             |
| 4 | Employment Screen                          |
| 5 | Costing Screen                             |

# 1 Find a Staff Member Using Accountants View

## 1.1 Initial Screen



## 1.2 Search screen with the Employee Number, Surname, Search and Select options highlighted

Surname	Inits	Title	Emp Number	National ID Number	Start Date	Forename

## 1.3 Enter either Staff Number or Surname and Search. You can then select the appropriate staff member from the list

## 2 Accountant View

Task - Accountants View - Tab Folder Viewer

ResourceLink  
aurora

Employee 2073595 : MRS E BUCKET

Exit

Details Employment Costing

Employee Number : 2073595

Title : MRS

First Name : EDNA

Last Name : BUCKET

Known as :

Age : 21 Years 8 Months

Gender : F

Date of Birth : 11/07/1988

CHANGE NUM MD90251

2.1 The **Accountant View** holds **3 tabs** of information:

Tab	Information
<b>Details</b>	Employee Number; Title; Name; Age; Gender; Date of Birth.
<b>Employment</b>	Main Post ID and Post description; Start Date; Original Start Date; End date; Position Status; Pay Point; Main Post Pattern; Probation End date; Probation Confirmation.  Additional information Post Grade; Post Holding and Hierarchy.
<b>Costing</b>	Post Holding Cost Centre (Name); Post Holding Cost Centre (Number); Cost Type – Payroll; Last Paid in Period; Last Paid in Year

### 3 Details Screen

Task - Accountants View - Tab Folder Viewer

ResourceLink aurora

Employee 2073595 : MRS E BUCKET

Exit

Details Employment Costing

Employee Number : 2073595

Title : MRS

First Name : EDNA

Last Name : BUCKET

Known as :

Age : 21 Years 8 Months

Gender : F

Date of Birth : 11/07/1988

CHANGE NUM MD90251

- 3.1 This screen can be used to locate personal details about the employee including name, age, date of birth and gender.

## 4 Employment Screen

Task - Accountants View - Tab Folder Viewer

ResourceLink aurora

Employee 2073595 : MRS E BUCKET

Exit

Details Employment Costing

Post Description : Trainer

Main Post : AA01000001 Pay Point : 37PR

Start Date : 01/02/2010 Main Post Pattern : 20MWF

Continuous Service : 01/02/2010 Probation End Date :

End Date : Probation Confirmation :

Position Status :

HMS Ref No:

Post Grades Post Holding Hierarchy View Pay Elements

Enter change mode CHANGE NUM MD90251

- 4.1 This screen contains information relating to an employee's post(s). The information on the front of this screen relates to the employee's **Main** post.
- 4.2 To look at all the posts that the employee currently holds or has held in the past, click on **Post Holding**.

MD903G2 Employee Post Holding History

Seq	Start Date	End Date	Post	M	Job	Grade	Status
001	14/02/2010		DD01003391		MSA1B&2	GRADE 1B	PS002
002	01/02/2010		AA01000001	Y	MSA3	GRADE 3	PS002

Add Change Delete Expand

Exit

- 4.3 If the employee is a **single post holder**, there will be only one row without an end date. If the employee is a **multi-post holder** there will be a row without an end date relating to each post they currently occupy at the university.
- 4.4 To view further details relating to a post, click on the row of the post you wish to see.

**MD903G32 - Post Holding Details**

Employment	
Start Date	01/02/2010 End Date

Post Holding	
Post Long Desc	Clerical Assistant
Post Start Date	14/02/2010
Grade	Level 1b
Contract Hours	12.00 FTE .33
Spinal Point	5 Rate 8.1390
Spinal Point Salary	5092.66
Position Status	Part Time - Permanent
Projected End Date	
Location	Highfield Campus, Southampton

Costing Details Contract Hours...

Exit

- 4.5 To look at cost centre information related to this post, click on **Costing Details**.

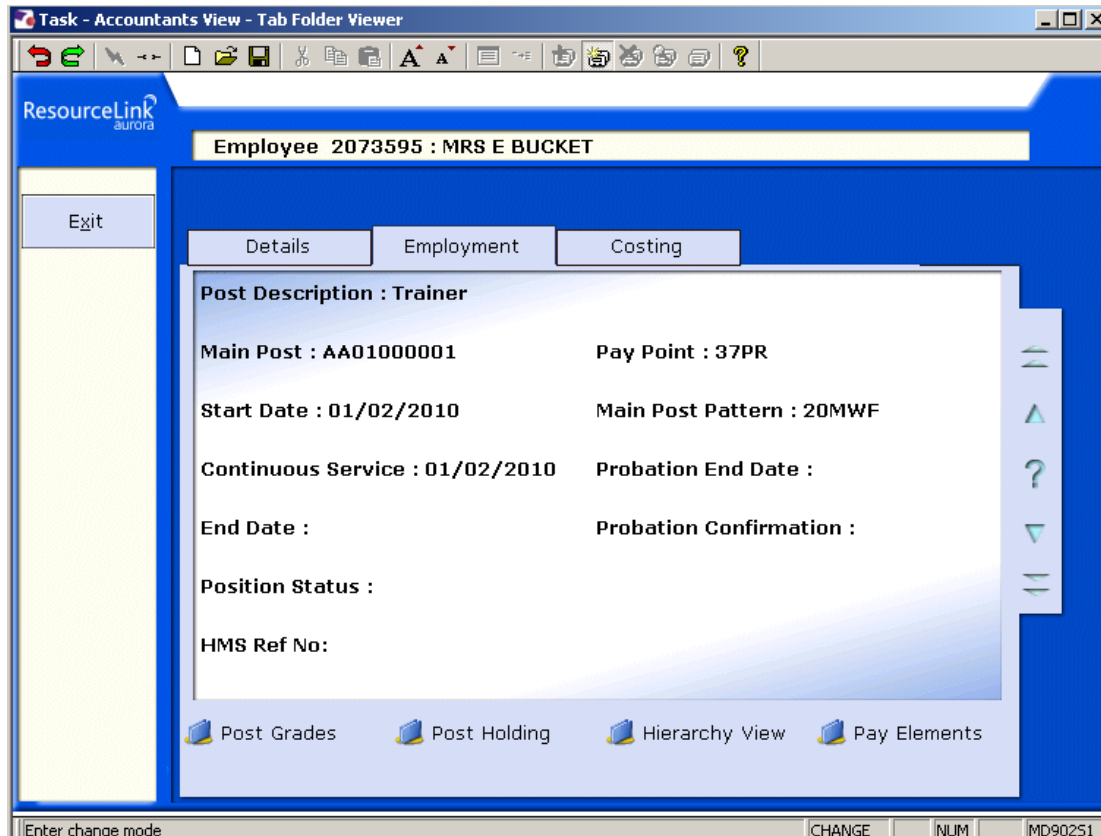
**MD903G33 - Post Costing Details**

Seq	Cost Centre Code	Ee's %	Er's %

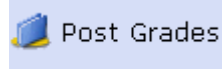
Add Select Delete

Exit

- 4.6 When you have finished viewing the information, click on **Exit**.
- 4.7 Continue to click **Exit** out of the screens until you return to the **Employment** tab.

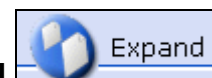


4.8 To view details on current and historical post grades click on **Post Grades**

[illegible]

4.9 The table will list the current grades for each post the employee holds and the historical grades and posts held in the past.

4.10 To look at further details, click on a row and click on **Expand**



Seq	Post	Start Date	Grade	Point	Rate	Amount	O	Det
001	DD01003391	14/02/2010	GRADE 1B	5	8.1390	5092.66	*	

End Date:      Override Date: 01/08/2011

Change Reason: SG001 New Appointment

Change Source: POSTPL Post Placement

Grade Source: POSTGD Post Grade

Override Reason: OR006 Deferred increment due to start date

Add Change Delete Expand Exit

- 4.11 When you have finished viewing the information, click on **Exit** to return to the **Employment** screen.

ResourceLink  
aurora

Employee 2073595 : MRS E BUCKET

Exit

Details Employment Costing

Post Description : Trainer

Main Post : AA01000001 Pay Point : 37PR

Start Date : 01/02/2010 Main Post Pattern : 20MWF

Continuous Service : 01/02/2010 Probation End Date :

End Date : Probation Confirmation :

Position Status :

HMS Ref No:

Post Grades Post Holding Hierarchy View Pay Elements

Enter change mode CHANGE NUM MD90251

- 4.12 To view where the employee sits within the HR Hierarchy, click on

**Hierarchy View**  Hierarchy View ..



[illegible]

#### 4.13 Click on **Select**

[illegible]

4.14 Click on **Exit** to return

4.15 Click on **Exit** to return to the **Employment** screen.

Task - Accountants View - Tab Folder Viewer

ResourceLink  
aurora

Employee 2073595 : MRS E BUCKET

Exit

Details Employment Costing

Post Description : Trainer

Main Post : AA01000001 Pay Point : 37PR

Start Date : 01/02/2010 Main Post Pattern : 20MWF

Continuous Service : 01/02/2010 Probation End Date :

End Date : Probation Confirmation :

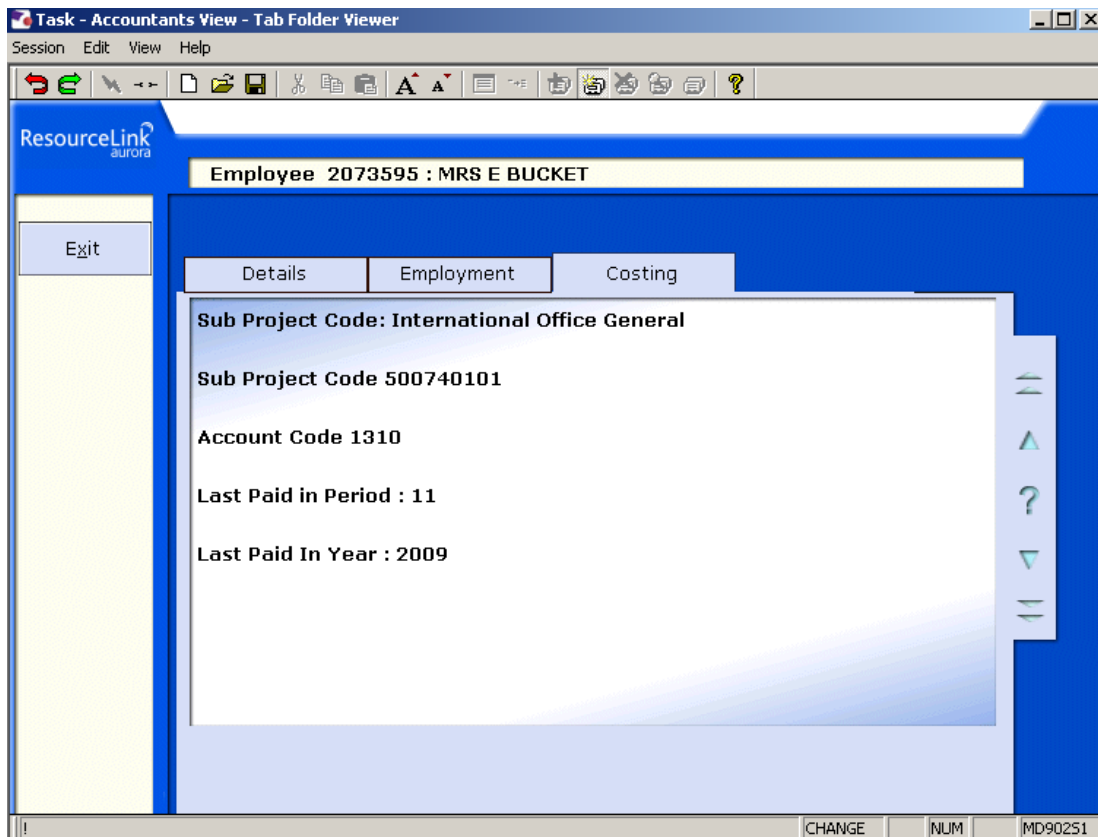
Position Status :

HMS Ref No:

Post Grades Post Holding Hierarchy View Pay Elements

Enter change mode CHANGE NUM MD90251

## 5 Costing Screen



- 5.1 This screen displays information relating to the **Sub Project Code** (also known as Cost Centre), the **Account Code** (also known as Cost Type) and the period and year of the last payment to the employee.

- 5.2 To exit out of **Accountant View**, click on **Exit**.

