

HUMAN RESOURCES

EMPLOYEES – ADD A NEW EMPLOYEE

Each employee within the company is loaded onto the system as an employee, with their personal details.

Employee details relate to what the company needs to know about its employees, and can include the following personal details, e.g. phone number and email address, banking details, loans, training details, Crafts details (skill or job title), etc.

By loading your employee details correctly, you will be able to keep track of employee shifts and manage your Human Resources more efficiently.

Ribbon Access: Finance / HR Employees



The **Employees** listing screen will display.

- Click on **Add**.

Employee#	FullName	EmailAddress	Manager
1	CO3Admin	CO3 Administrator	Eliseo Felix
2	ROW001	Eden Rowan	
3	FOX967	Alanna Fox	Antonio Gordon
4	GOR956	Antonio Gordon	Elanna Pugh
5	MCK133	Taylor McKenzie	Elanna Pugh
6	SC0397	Scott Scott	Aurora Barr
7	BMS882	Aurora Barr	Elanna Pugh
8	HSG188	Harley Higgins	Leighton Gibbs
9	GIB539	Leighton Gibbs	Elanna Pugh
10	STA045	Deacon Stanley	Gracelyn Pierce
11	PIE284	Gracelyn Pierce	Elanna Pugh
12	FRA202	Nicolas Franklin	
13	FER996	Angela Fernandez	Bentley Kane
14	KAN277	Bentley Kane	Elanna Pugh
15	PUG956	Elanna Pugh	Eden Rowan
16	DON348	Judson Donaldson	Elanna Pugh
17	PH472	Natasha Phelps	Hanna Decker
18	DEC262	Hanna Decker	Elanna Pugh
19	SIN061	Aleena Singh	Elanna Pugh
20	BEL256	Louis Bell	Elanna Pugh
21	PIE375	Itzel Fields	Elanna Pugh
22	BAI223	Clayton Bailey	Kennedy Byrd
23	BYR113	Kennedy Byrd	Elanna Pugh
24	HO624	Cristian Ho	Calliope Pruitt
25	PRU026	Calliope Pruitt	Elanna Pugh
26	FR1723	Garin Friedman	Aslyn Brandt

- The **Add new Employee** screen will open.

The 'Add New Employee' form contains the following sections:

- Employee Information:** Employee Number, First Name, Second Name, Initials, Last Name, ID Number, Birth Date (01 Nov 2023), Phone Number (W), Extension (W), Phone Number (H), Fax Number, Mobile Number, Email Address, Passport Number, Marital Status, Manager, Department, User ID, Bank Name, Account Name, Account Number, Default Account.
- Physical Address:** City, Province, Postal Code, Country, Postal Address, City, Province, Postal Code, Country, Branch Name, Branch Code, Account Type.
- Dependants:** Table with columns: First Name, Middle Name, Last Name, ID Number, Birth Date, Relation, Is Dependent.
- Shifts:** Table with columns: Star Date, Shift Name, Star Day.
- Crafts:** Table with columns: Craft Name, Craft Desc, Site Description, Account Code, COSA Code, Cost Estimate, Rate, Is Primary.

ADD EMPLOYEE DETAILS

TYPE THE NEW EMPLOYEE DETAILS IN THE SELF-EXPLANATORY FIELDS:

- Ensure that all mandatory [*] fields and **Crafts** details are filled in otherwise the employee details will not save.

- Please note that the **Employee Number** is the unique code given by the company to keep track of an employee.

The standard convention is to use the first 3 letters of the employee's surname, followed by 3 digits, e.g. **BON001**, for David Bond.

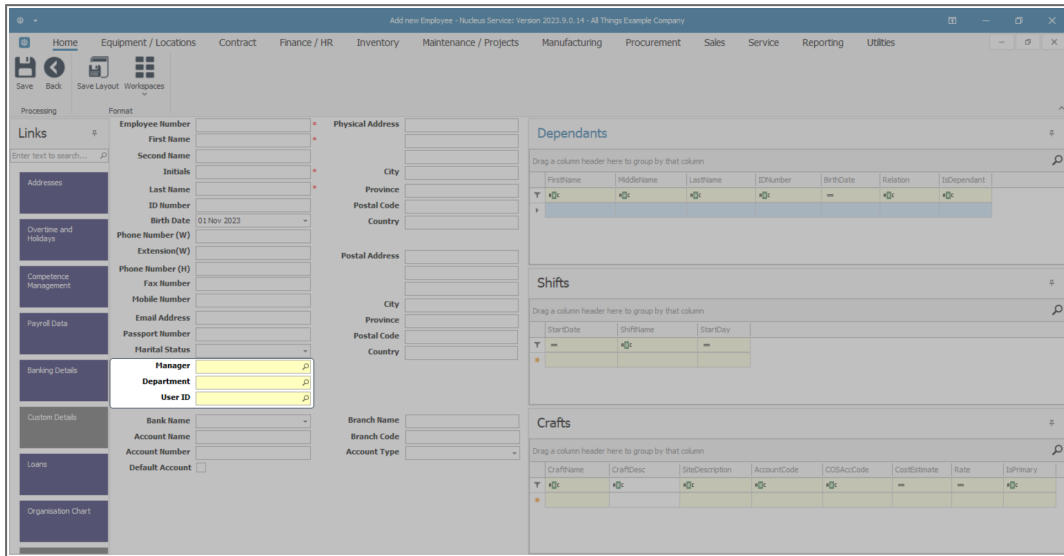
The digits will increase as employees with the same 3 letters in their surname are added to the company.

The screenshot shows a web application for adding a new employee. The interface includes a top navigation bar with various modules like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a sidebar with 'Links' and a search bar. The main content area is divided into several sections:

- Employee Number:** A form with fields for First Name, Second Name, Initials, Last Name, ID Number, Birth Date (set to 01 Nov 2023), Phone Number (W), Extension (W), Phone Number (H), Fax Number, Mobile Number, Email Address, Passport Number, Marital Status, Manager, Department, and User ID.
- Physical Address:** A form with fields for City, Province, Postal Code, Country, and Postal Address.
- Dependants:** A table with columns for Firstname, Middlename, Lastname, IDNumber, BirthDate, Relation, and IsDependant.
- Shifts:** A table with columns for StartDate, Shiftname, and StartDay.
- Crafts:** A table with columns for CraftName, CraftDesc, SiteDescription, AccountCode, COSAccCode, CostEstimate, Rate, and IsPrimary.

The bottom status bar indicates the user is 'Brigitte', the date is '01 Nov 2023', the version is '2023.9.0.14', and the company is 'All Things Example Company'.

THE MANAGER, DEPARTMENT AND USER ID FIELDS ARE VERY IMPORTANT:



MANAGER

- Click on the search button and select the person who manages this employee.
- This is important for Nucleus CRM, as the manager will be able to see the team members sales progress.



DEPARTMENT

- Click on the search button and select the department to which this employee is linked.
- It is important to select the correct department, especially where the department is used for posting financial transactions.



USER ID

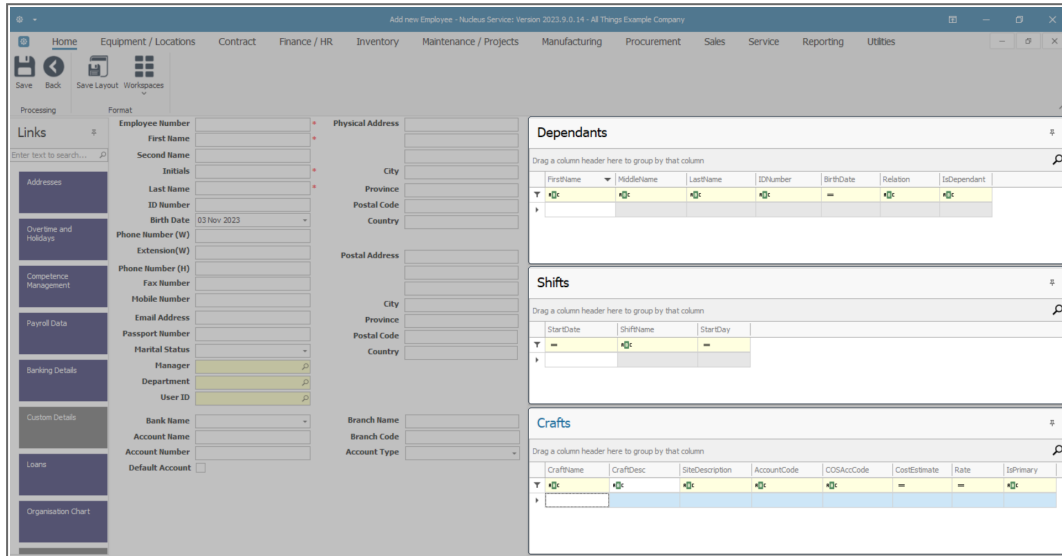
- Click on the search button and [select the User ID](#).
- This is utilised when the employee is also going to be a **user** and will need to log in to **Nucleus Service** and use the system.



A search input field with a yellow background and a magnifying glass icon on the right. The text "User ID" is displayed on the left side of the input area.

Move to the right of the screen to the additional information docking panels:

Click on the links below to direct you to instructions on how to add information to these panels.



ADD A DEPENDANT

- If this employee has any [Dependants](#) (any person, child or adult, who rely on the employee for financial support), then the dependant details can be **added**, **edited** and **deleted** here.

Dependants						
FirstName	MiddleName	LastName	IDNumber	BirthDate	Relation	IsDependant
⌵	⌵	⌵	⌵	=	⌵	⌵

ADD A SHIFT

- If this employee is to be linked to a [Shift](#), (or work schedule), then this is where you will **add**, **edit** and **delete** the relevant shift details.

Shifts			
Drag a column header here to group by that column			
StartDate	ShiftName	StartDay	
=	#c	=	

ADD A CRAFT

- Every Employee must be linked to at least one [Craft](#) to be able to save the new employee details.
- Each employee can be [assigned](#) **more than one Craft** per Site / Branch but **only one** of those **Crafts** can be set as the **Primary Craft**.
- Refer to these links to [add](#), [edit](#) and [delete](#) **Crafts**.

Crafts								
Drag a column header here to group by that column								
CraftName	CraftDesc	SiteDescription	AccountCode	COSAccCode	CostEstimate	Rate	IsPrimary	
#c	#c	#c	#c	#c	=	=	#c	

SAVE NEW EMPLOYEE

- When you have finished adding the new employee details -
- Click on **Save**.

The screenshot shows the 'Add new Employee' form in Nucleus Service. The form is filled with details for an employee named David Bond, including personal information, contact details, and banking information.

Employee Information:

- Employee Number: B0N001
- First Name: David
- Second Name: Bond
- Initials: D.
- Last Name: Bond
- ID Number: 0000
- Birth Date: 03 Nov 2023
- Phone Number (W): 0000
- Extension (W): 0000
- Phone Number (H): 0000
- Fax Number: 0000
- Mobile Number: 0000
- Email Address: david.bond@example.co.za
- Passport Number: [Empty]
- Marital Status: Married
- Manager: CO3 Administrator
- Department: Human Resources
- User ID: David Bond

Physical Address: 00Example, Durban, KZN, 4001, South Africa

Postal Address: P O Box 0000, Durban, KZN, 4000, South Africa

Branch Information: Branch Name: Durban, Branch Code: 0000, Account Type: Current Account

Dependants:

First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependent
Joy		Bond	0000	03 Nov 2023	Child Dependent	Yes

Shifts:

Start Date	Shift Name	Start Day
03 Nov 2023	Weekday Weekend	1

Crafts:

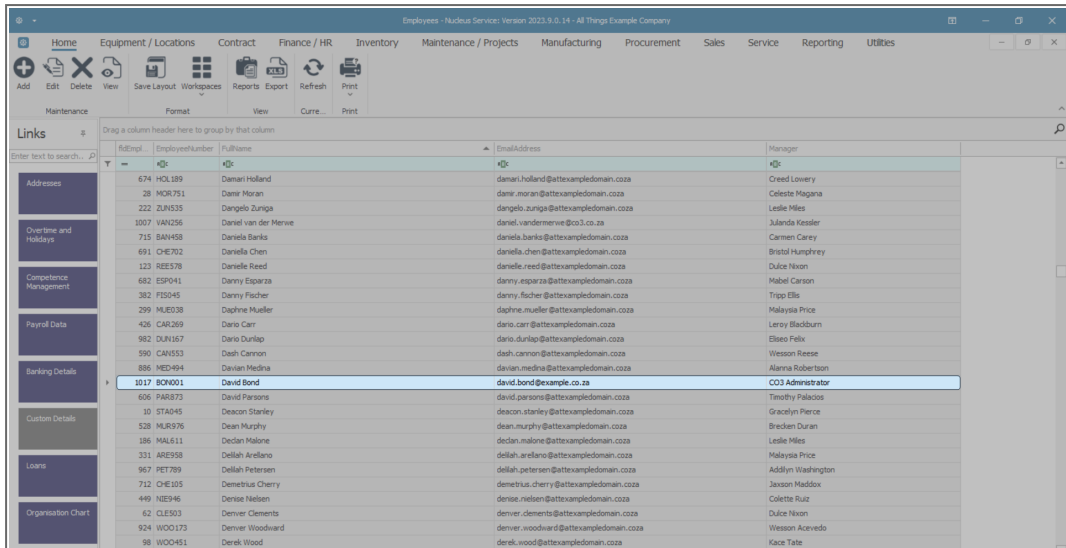
Craft Name	Craft Desc	Site Description	Account Code	COSAccCode	Cost Estimate	Rate	Is Primary
HRM	Human Resources Manager	KwaZulu-Natal	1100	2100	500.00	1,000.00	Yes

- A message box will pop up advising the following:
 - **Employee: [] has been saved.**
- Click on **Ok**.

The screenshot shows the 'Add new Employee' form in Nucleus Service. A confirmation message box is overlaid on the form, stating: "Employee: B0N001 has been saved". The message box has an "OK" button.

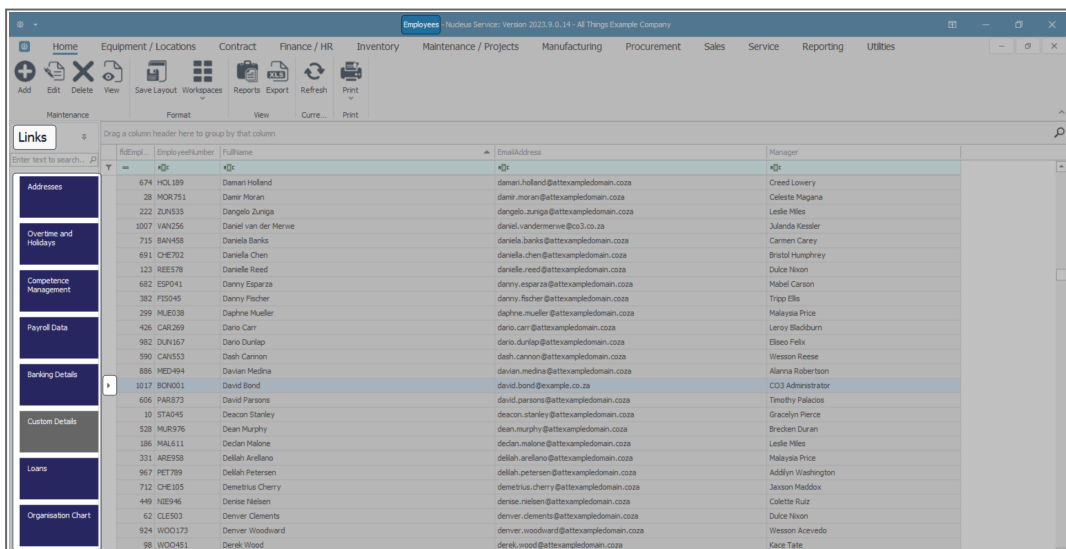
VIEW NEW EMPLOYEE

- You will return to the **Employees** listing screen.
- The new employee can now be viewed in the data grid.



FUNCTION TILES - LINKS PANEL

- You are now able to utilise the [function tiles](#) on the left side of the **employees** listing screen in the **Links** panel.
- Clicking on each function tile will enable you to include further information concerning the selected **employee**.
- When working with these tiles, ensure that you have selected the correct employee before you click on any tile.





Add a New Employee

MNU.021.001