

HUMAN RESOURCES

EMPLOYEES - DOCUMENTS

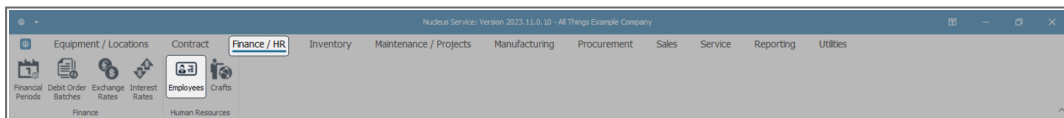
The **Documents** tile allows you to **add, edit, delete** and **view** digital documents linked to a selected **employee**, for example, a contract of employment.

All your customer documents can be kept in one place by making use of this link.

The document should be saved on the **server** to enable all users with the relevant security rights to view the document.

If saved and linked from the workstation, another workstation cannot view the document.

Ribbon Access: Finance / HR Employees



The **Employees** listing screen will display.

VIEW EMPLOYEE DOCUMENTS

SELECT EMPLOYEE

- Select the **row** of the employee whose list of digital documents you wish to view.
- Click on the **Documents** tile in the **Links** panel.

REID	EmployeeN	FullName	EmailAddress	Manager	DepartmentName
93	RE1612	Adelyn Reid	adelyn.reid@texampledomain.co.za	Dulce Nixon	Quality Assurance
159	DO0851	Adelynn Dodson	adelynn.dodson@texampledomain.co.za	Rory Soto	Service Centre
255	GAR674	Adrianna Garrett	adrianna.garrett@texampledomain.co.za	Malaysia Price	Administration
100	GRE607	Ahmad Gregory	ahmad.gregory@texampledomain.co.za	Fox Sierra	Service Centre
402	LN969	Aidan Lindsey	aidan.lindsey@texampledomain.co.za	Tru Tate	Purchasing
38	WAL259	Aiden Walters	aiden.walters@texampledomain.co.za	Elanna Pugh	Safety
229	FIG091	Aidja Figueroa	aidja.figueroa@texampledomain.co.za	Leslie Miles	0
335	CLA466	Aislinn Clay	aislinn.clay@texampledomain.co.za	Malaysia Price	Maintenance
1008	DUB578	AJ Dube	AJ.Dube@co3.co.za	Juanda Kessler	0
555	TOD964	Alaya Todd	alaya.todd@texampledomain.co.za	Phoebe McClain	Quality Assurance
623	LAN902	Alana Lang	alana.lang@texampledomain.co.za	Timothy Palacios	Stock Control
825	ROB989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofia Simmons	Sales
115	SH636	Alanna Sheppard	alanna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alaric Perkins	alaric.perkins@texampledomain.co.za	Sofia Simmons	Sales
101	GUE261	Alaya Guerrero	alaya.guerrero@texampledomain.co.za	Dulce Nixon	Service Centre
300	HEN531	Albert Henson	albert.henson@texampledomain.co.za	Harley Briggs	Quality Assurance
19	SIN251	Alena Singh	alena.singh@texampledomain.co.za	Elanna Pugh	Human Resources
291	WAB248	Alena Wilne	alena.wilne@texampledomain.co.za	Rory Schneider	Marketing
400	BAB109	Alex Barron	alex.barron@texampledomain.co.za	Corbin McConnell	Administration
724	COL656	Alexander Coleman	alexander.coleman@texampledomain.co.za	Roman Simpson	Service Centre
287	SH6787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Aislinn Clay	Maintenance
643	AGU269	Alexandra Aguirre	alexandra.aguirre@texampledomain.co.za	Timothy Palacios	0
559	DAU006	Alexandra Daugherty	alexandra.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HUY032	Alexandra Huynh	alexandra.huynh@texampledomain.co.za	Leslie Miles	Implementations
181	SAL398	Alexis Sales	alexis.sales@texampledomain.co.za	Leslie Miles	0
152	NGU219	Afred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre

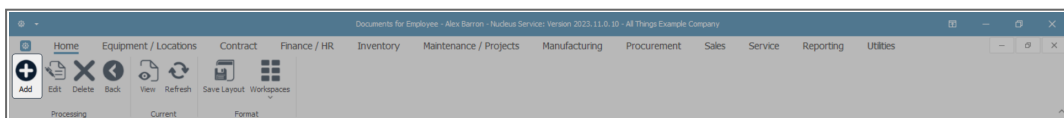
VIEW DOCUMENTS LIST

- The **Documents for Employee - []** screen will open.
- If there are any documents currently linked to the selected employee, they will be listed here.
- In this example, only **1** document is currently linked to the employee.

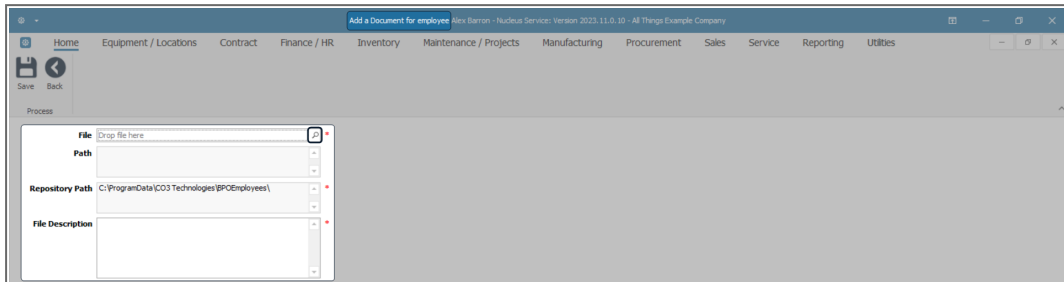
DocumentDescription	DocumentName	DocumentPath	Status
Test Document All Things Example Company	TestDocument_FunctionTitle.docx	C:\ProgramData\CO3 Technologies\BPO\Employees\400\	A

ADD EMPLOYEE DOCUMENT

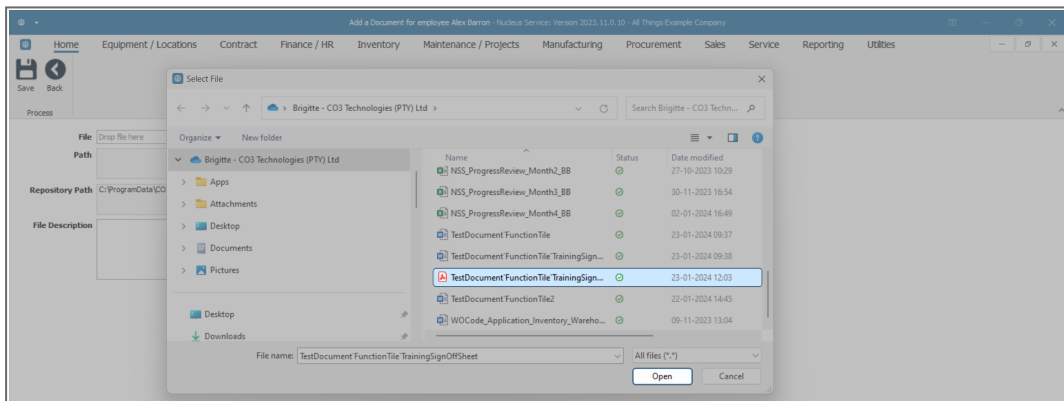
- Click on **Add**.



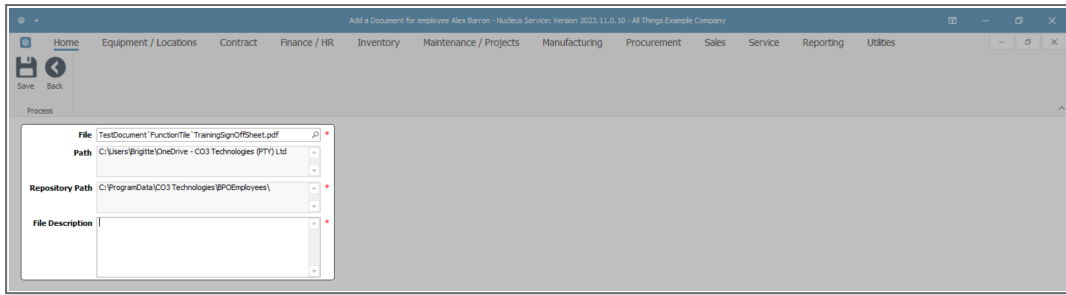
- The **Add a Document for employee []** screen will open.
- Click on the **search** button in the **File** field.



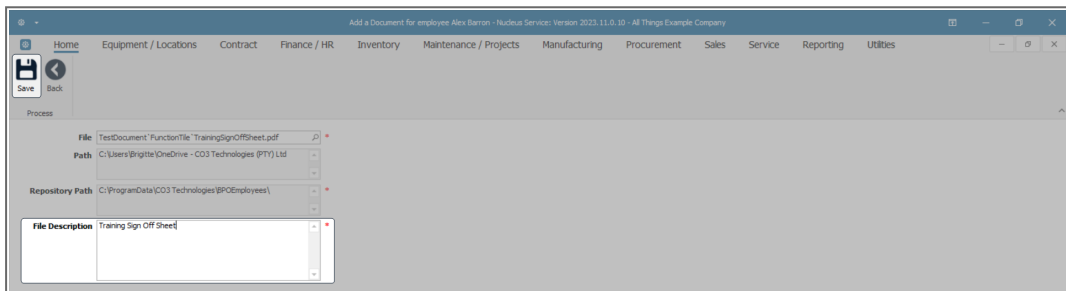
- From the **Select File** pop up screen -
- Find the **file** on your **server / computer** that you wish to **link**.
- Ensure that the document name appears in the **File name:** field by clicking on the document to select it.
- Click on **Open**.



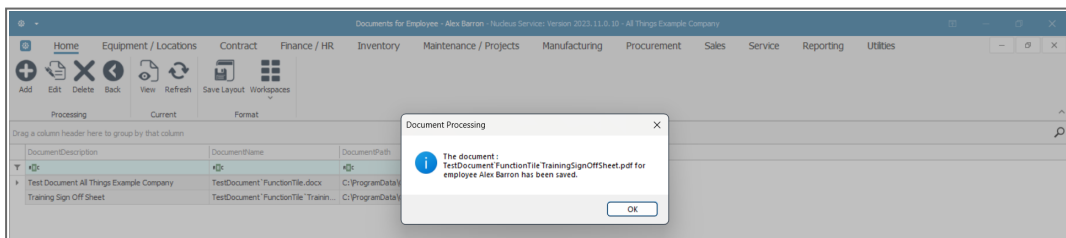
- The **File** and **Path** fields will now populate with the details of your selected document.
- **Repository Path** field is auto populated with what has been **configured** on your system.
- Type a **description** of the attached the document in the **File Description** field.



- When you have added the **File Description** -
- Click on **Save**.

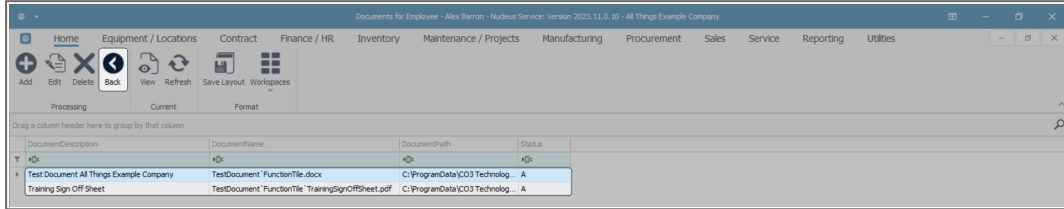


- You will return to the **Documents for Employee - []** screen.
- A **Document Processing** message box will pop up, advising the following:
 - **The document: [] for employee [] has been saved.**
- Click on **OK**.



VIEW ADDED DOCUMENT

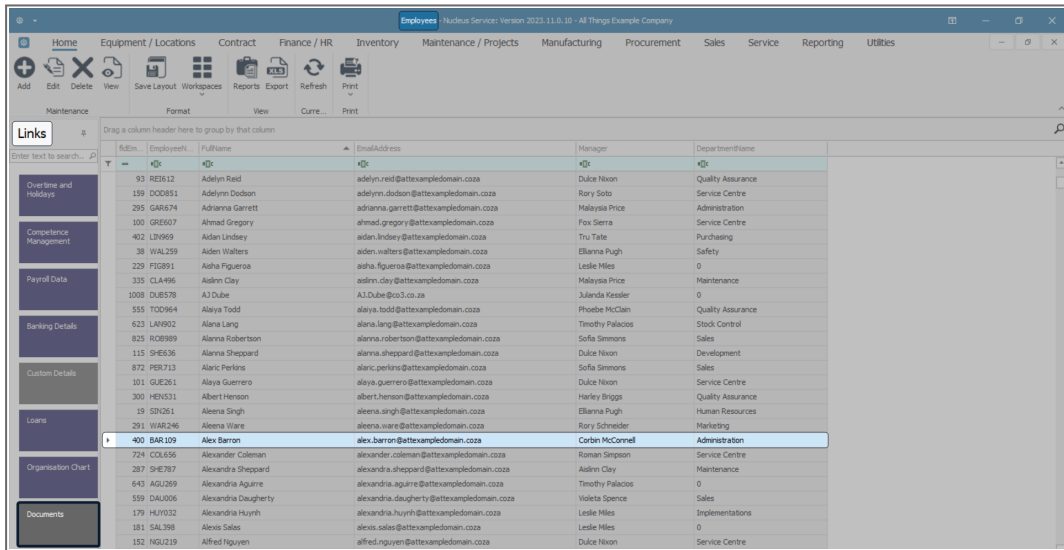
- You can view the added document in the data grid.
- Click on **Back** to return to the **Employees** listing screen.



EDIT EMPLOYEE DOCUMENT

SELECT EMPLOYEE

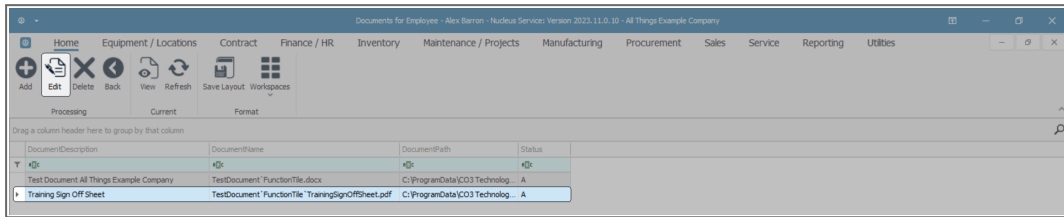
- In the **Employees** listing screen -
- Select the **row** of the employee whose document you wish to **edit**.
- Click on the **Documents** tile in the **Links** panel.



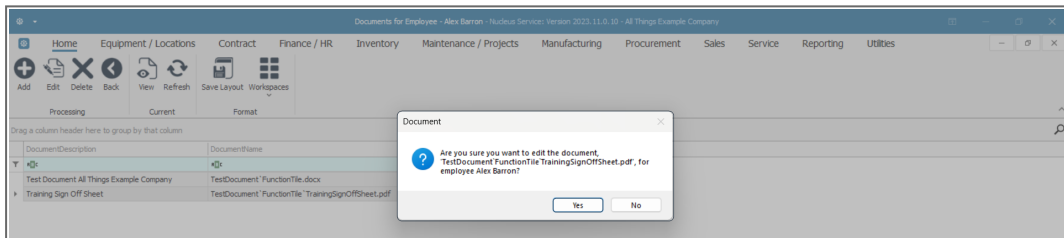
SELECT DOCUMENT

- The **Documents for Employee - []** screen will open.

- Select the **row** of the document where you wish to make changes.
- Click on **Edit**.

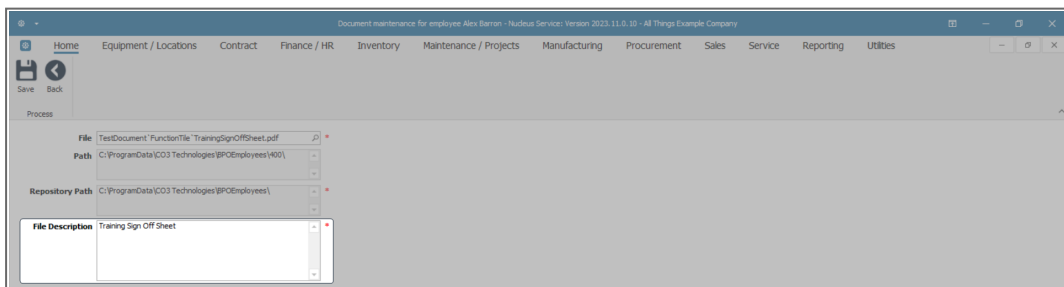


- A **Document** message box will pop up with the following prompt:
 - **Are you sure you want to edit the document, '[]', for employee []?**
- Click on **Yes**.



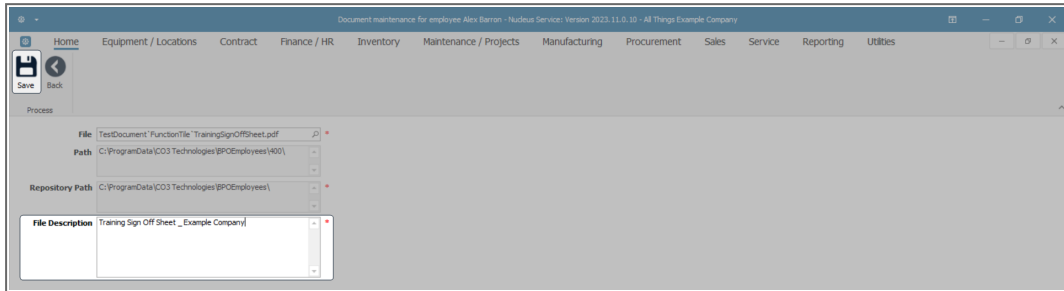
EDIT DOCUMENT DETAILS

- The **Document Maintenance for employee []** screen will open.
- Make the changes to the relevant fields, as required.
- In this example, the **File Description** is to be edited.

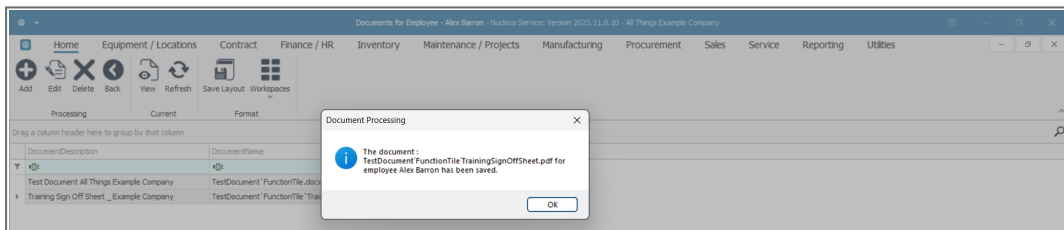


SAVE EDITED DOCUMENT

- Click on **Save**.

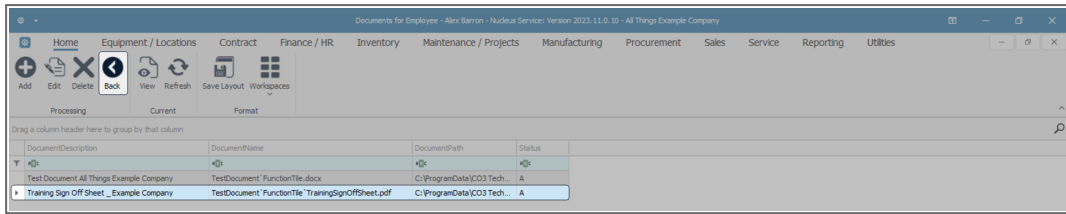


- You will return to the **Documents for Employee - []** screen.
- A **Document Processing** message box will pop up advising the following:
 - **The document: [] for employee [] has been saved.**
- Click on **OK**.



VIEW EDITED DOCUMENT

- You can view the changes in the data grid.
- In this example, the **Document Description** column now displays the changes made in the previous screen.
- Click on **Back** to return to the **Employees** listing screen.

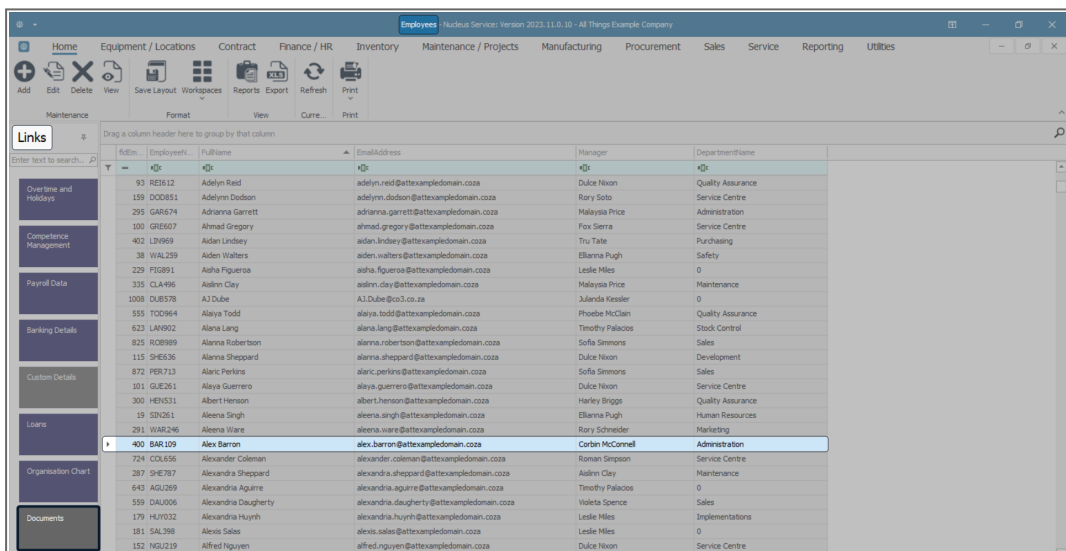


DELETE EMPLOYEE DOCUMENT

- In the **Employees** listing screen -

SELECT EMPLOYEE

- Select the **row** of the employee for whom you wish to delete a digital document.
- Click on the **Documents** tile in the **Links** panel.

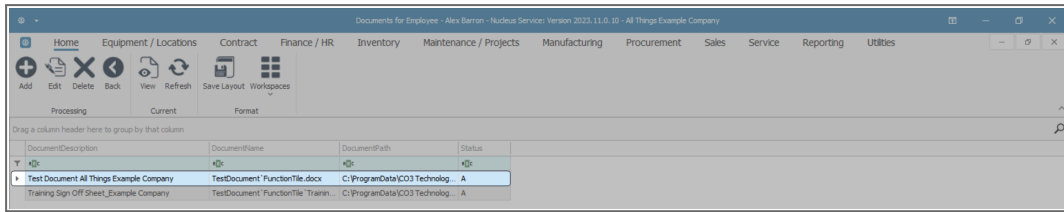


- The **Documents for Employee - []** screen will open.

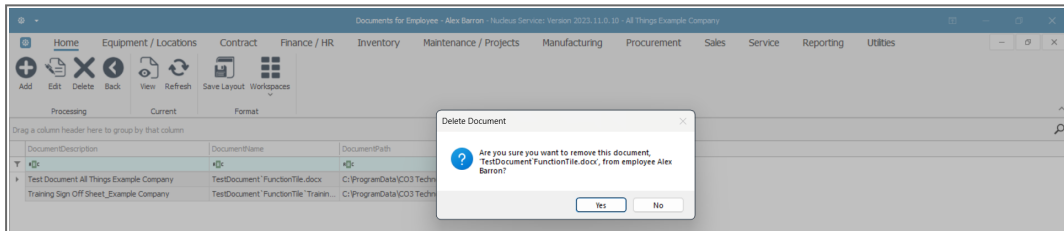
SELECT DOCUMENT

- Select the **row** of the document that you wish to remove from the data grid.

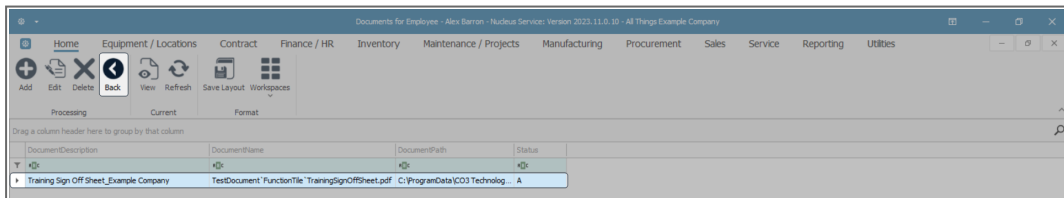
- Click on **Delete**.



- A **Delete Document** message box will pop up with the following prompt:
 - **Are you sure you want to remove this document, '[]', from employee []?**
- Click on **Yes**.



- The selected document will be **removed** from the data grid.
- Click on **Back** to return to the **Employees** listing screen.

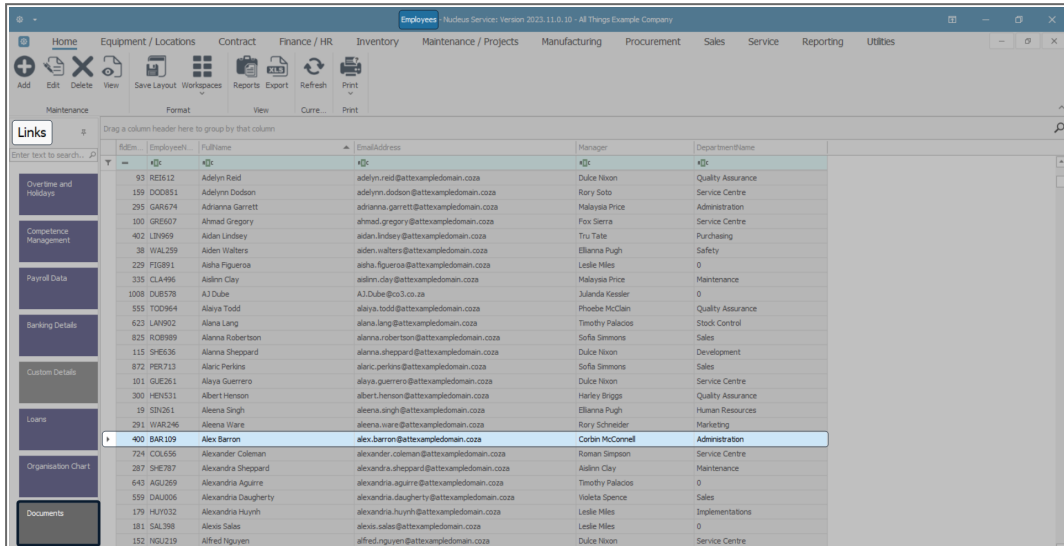


OPEN EMPLOYEE DOCUMENT

SELECT EMPLOYEE

- In the **Employees** listing screen -

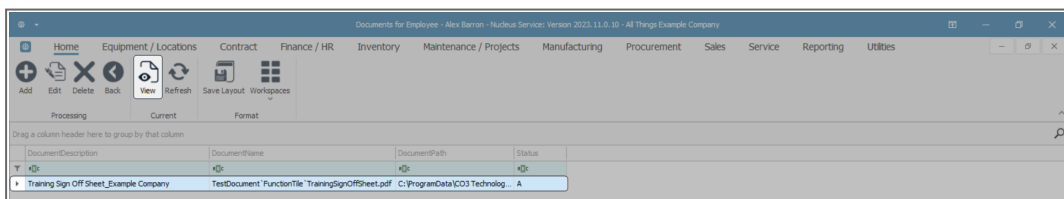
- Select the **row** of the employee whose document you wish to **open** and **view**.
- Click on the **Documents** tile in the **Links** panel.



- The **Documents for Employee - []** screen will open.

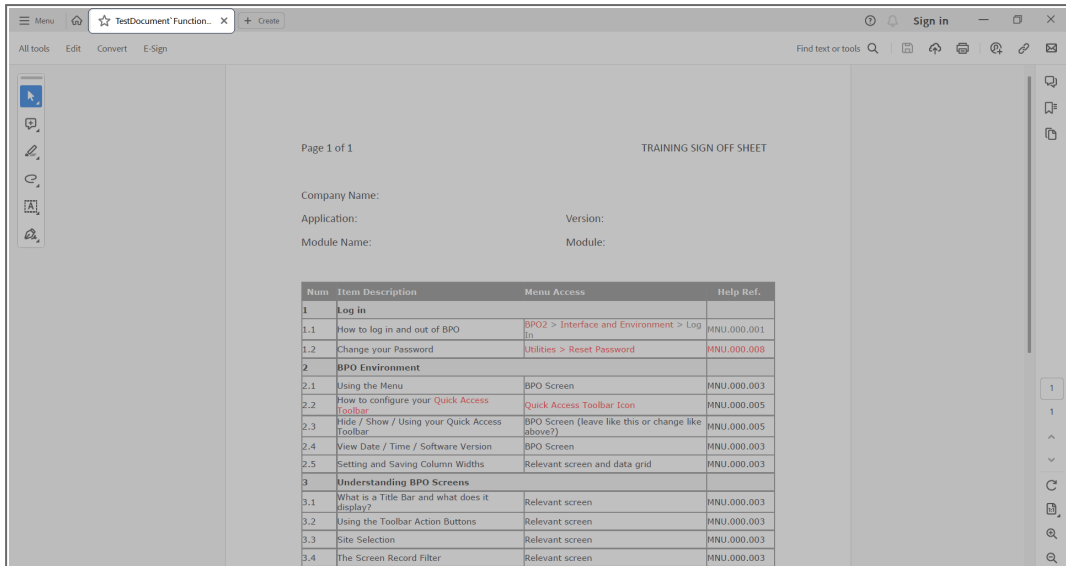
SELECT DOCUMENT

- Select the **row** of the document you wish to open and view.
- Click on **View**.

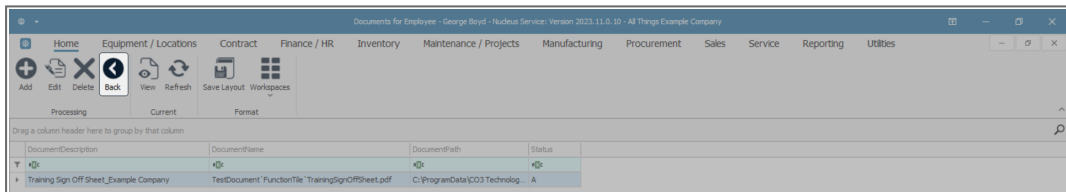


VIEW DOCUMENT CONTENTS

- The document will open with the relevant program, for example, a **pdf** will open in **Adobe Reader**, a **Word** document will open with the **Microsoft Word** application (if installed on your PC).



- When you return to Nucleus Service to the **Documents for Employee - []** screen, click on **Back** to return to the **Employees** listing screen.



MNU.021.019

