HUMAN RESOURCES

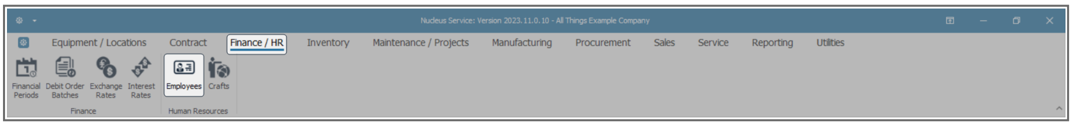
EMPLOYEES - DOCUMENTS

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

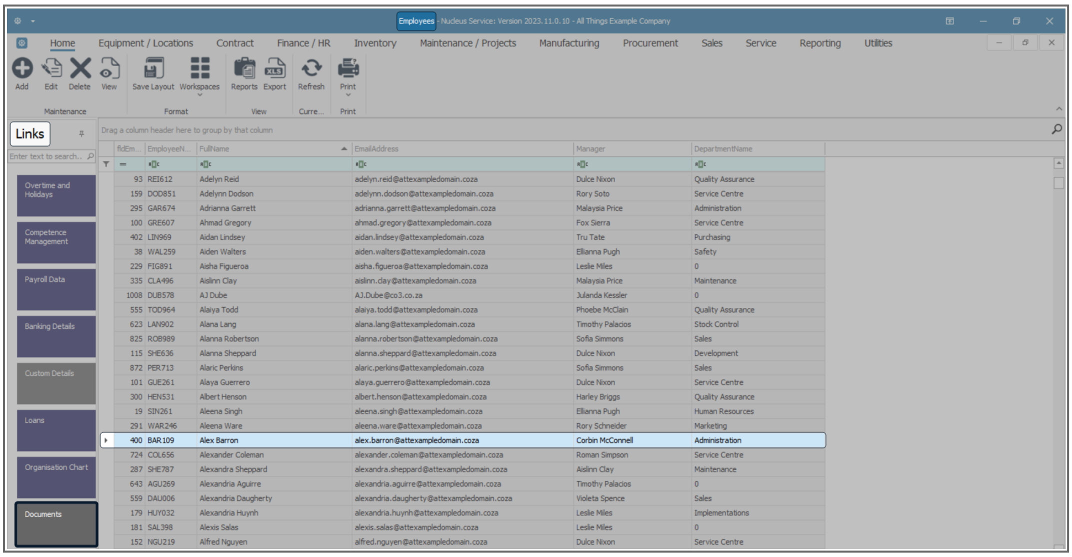


The **Employees** listing screen will display.

VIEW EMPLOYEE DOCUMENTS

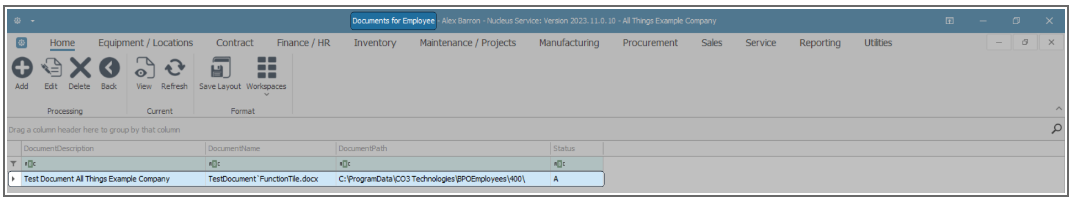
SELECT EMPLOYEE

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



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.

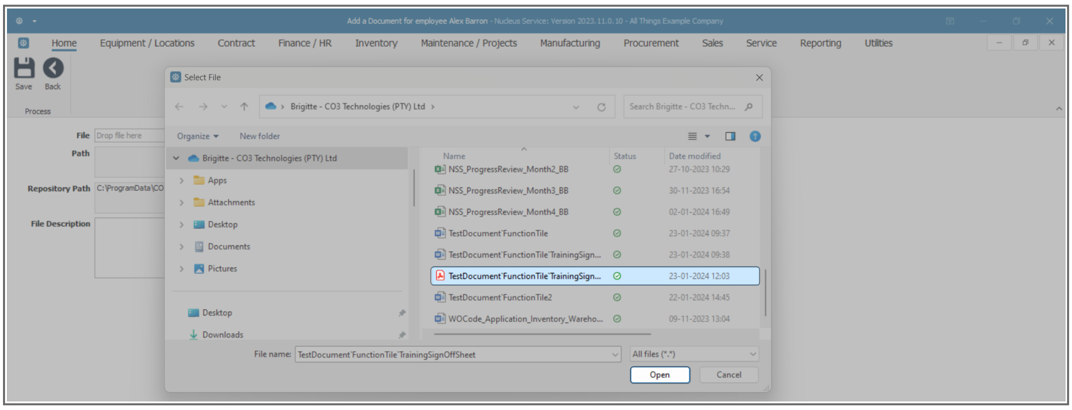


ADD EMPLOYEE DOCUMENT

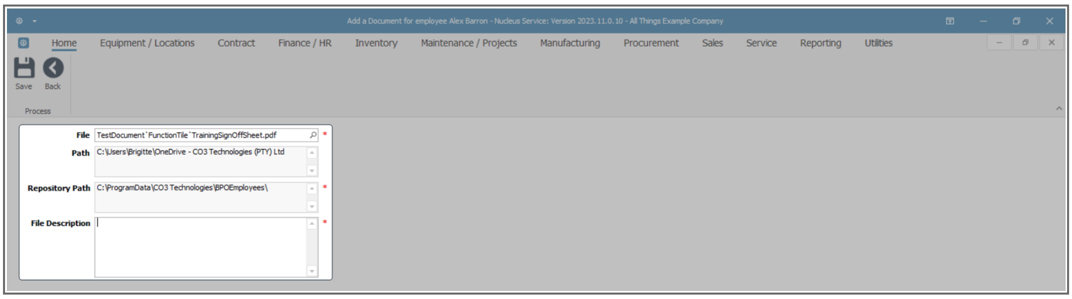
- Click on **Add**.

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

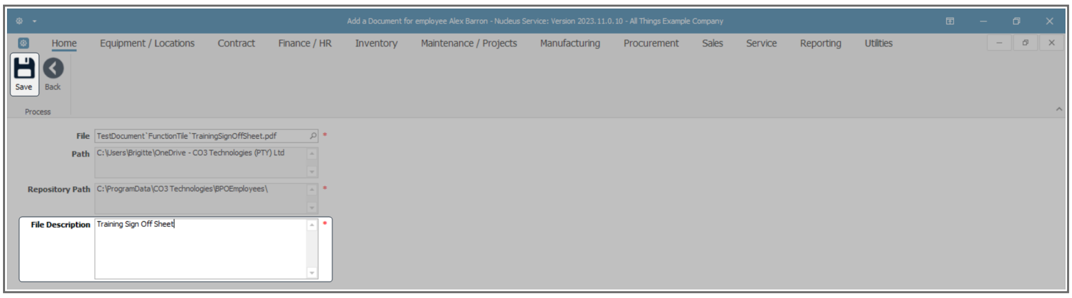
- From the **Select File** pop up screen -
- Find the **file** on your **server / computer** that you wish to **link**.
- Ensure that the document name appears in the **File name:** field by clicking on the document to select it.
- Click on **Open**.



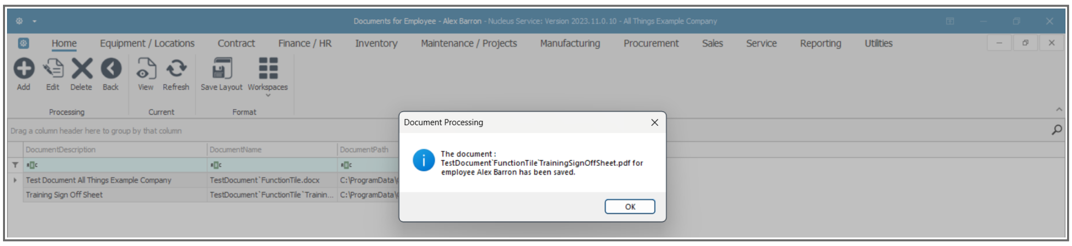
- The **File** and **Path** fields will now populate with the details of your selected document.
- **Repository Path** field is auto populated with what has been configured on your system.
- Type a **description** of the attached the document in the **File Description** field.



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

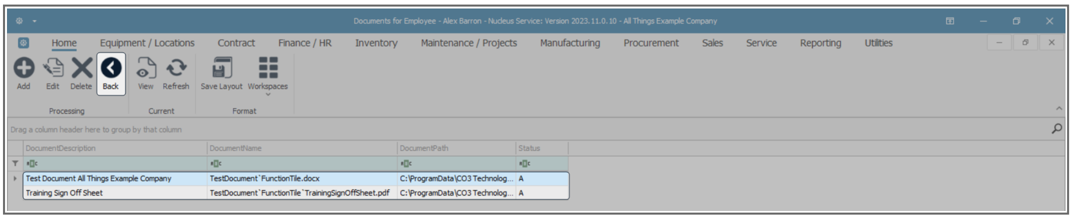


- You will return to the **Documents for Employee - [ ]** screen.
- A **Document Processing** message box will pop up, advising the following:
  - **The document: [ ] for employee [ ] has been saved.**
- Click on **OK**.



VIEW ADDED DOCUMENT

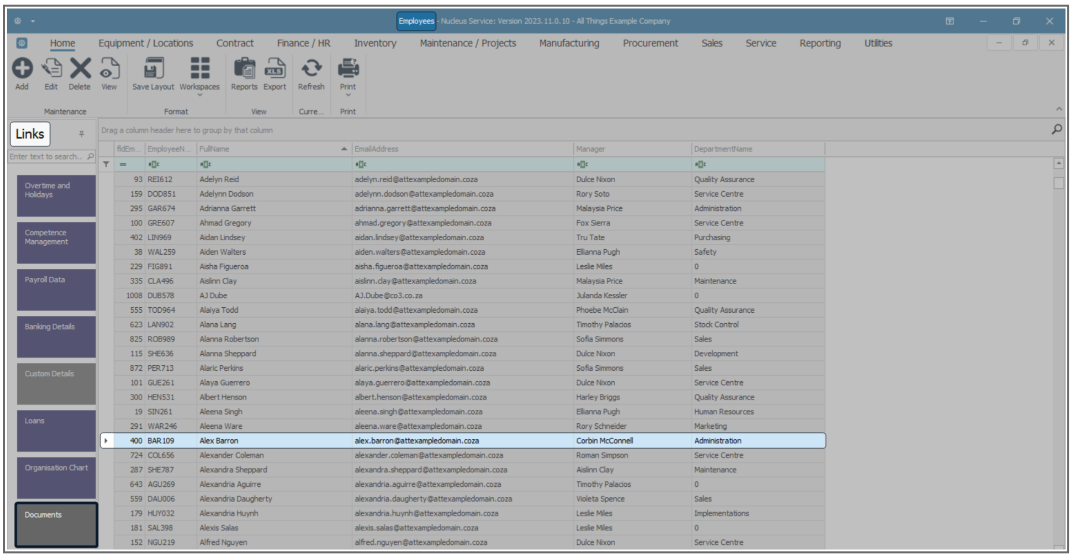
- You can view the added document in the data grid.
- Click on **Back** to return to the **Employees** listing screen.



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.

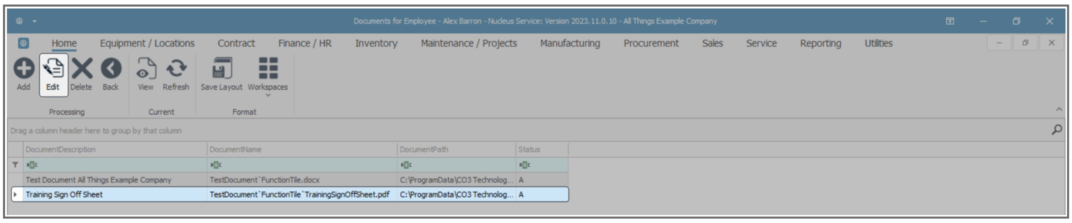


SELECT DOCUMENT

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

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

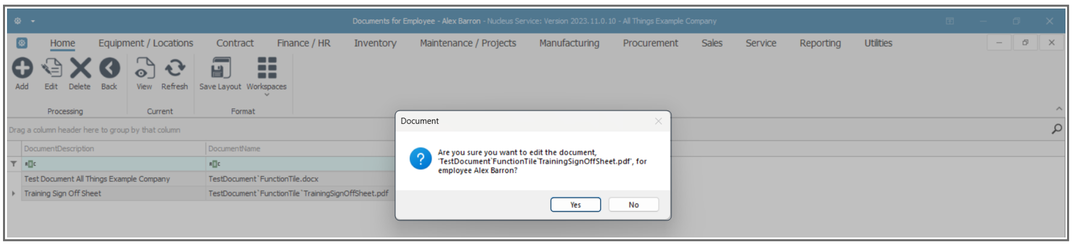
- Click on **Edit**.



- 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**.



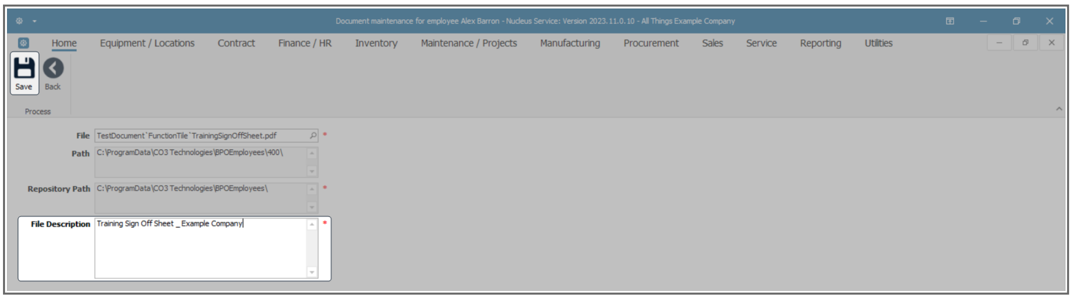
EDIT DOCUMENT DETAILS

- The **Document Maintenance for employee [ ]** screen will open.
- Make the changes to the relevant fields, as required.

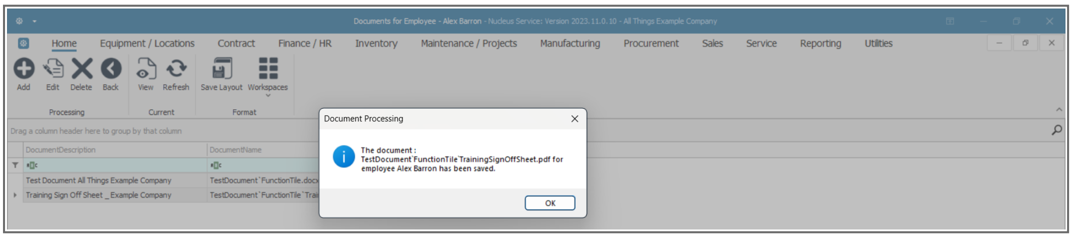
- In this example, the **File Description** is to be edited.

SAVE EDITED DOCUMENT

- Click on **Save**.

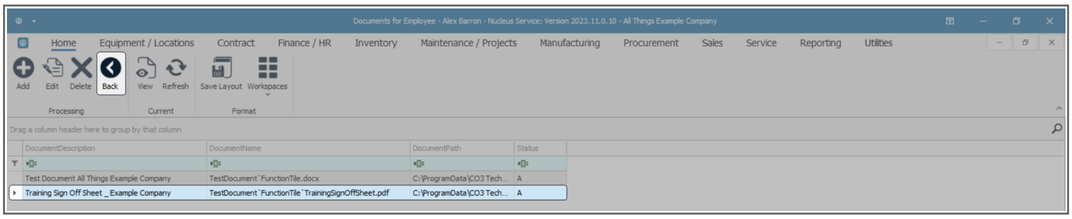


- You will return to the **Documents for Employee - [ ]** screen.
- A **Document Processing** message box will pop up advising the following:
    - **The document: [ ] for employee [ ] has been saved.**
- Click on **OK**.



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.

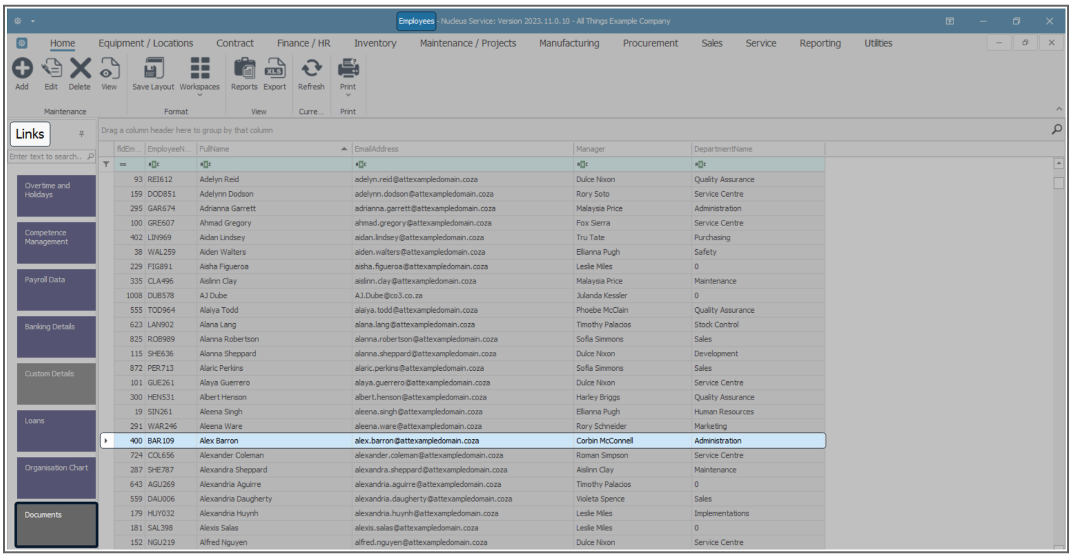


DELETE EMPLOYEE DOCUMENT

- 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.

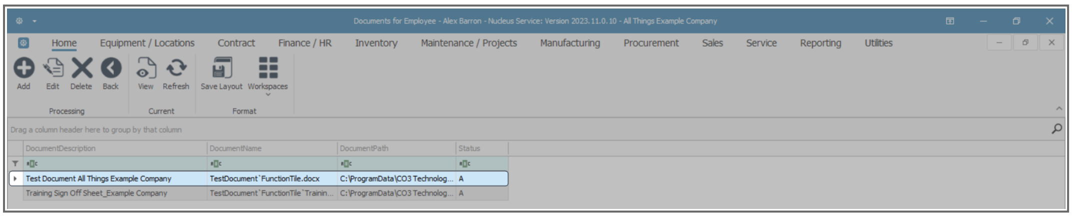


- The **Documents for Employee - [ ]** screen will open.

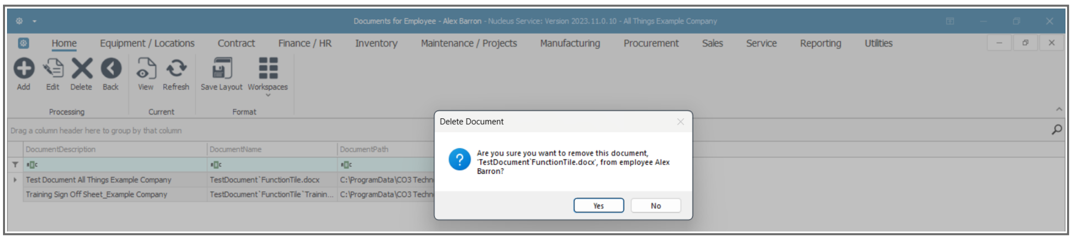
SELECT DOCUMENT

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

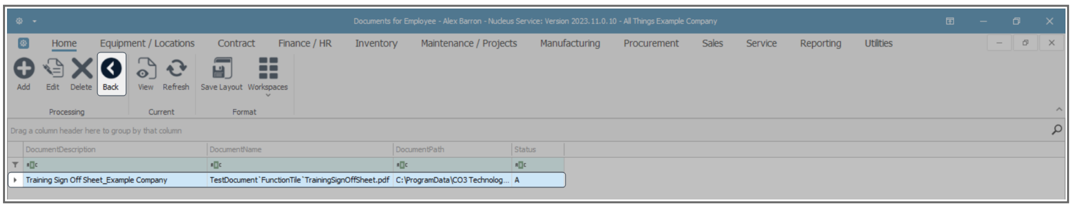
- Click on **Delete**.



- 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.

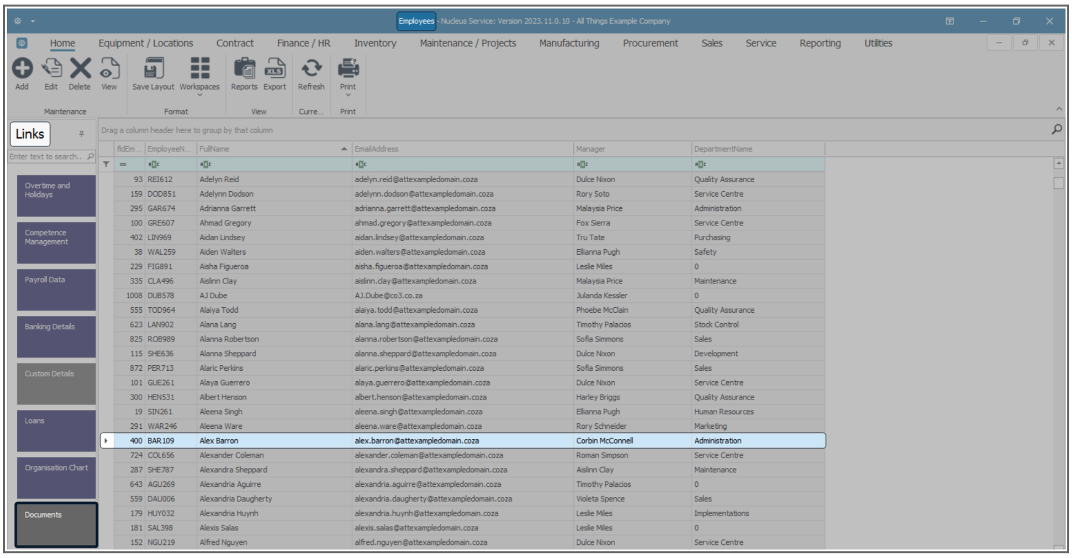


OPEN EMPLOYEE DOCUMENT

SELECT EMPLOYEE

- In the **Employees** listing screen -

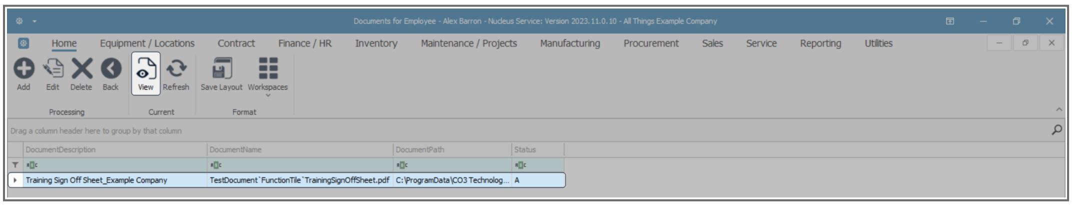
- Select the **row** of the employee whose document you wish to **open** and **view**.
- Click on the **Documents** tile in the **Links** panel.



- 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).


Page 1 of 1 TRAINING SIGN OFF SHEET

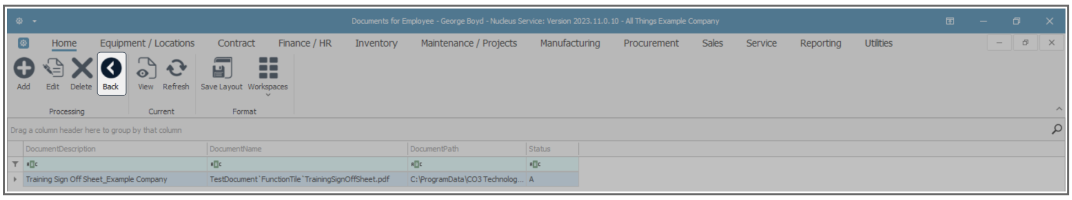
Company Name:

Application: Version:

Module Name: Module:

Num	Item Description	Menu Access	Help Ref.
1	Log in		
1.1	How to log in and out of BPO	BPO2 > Interface and Environment > Log in	MNU.000.001
1.2	Change your Password	Utilities > Reset Password	MNU.000.008
2	BPO Environment		
2.1	Using the Menu	BPO Screen	MNU.000.003
2.2	How to configure your Quick Access Toolbar	Quick Access Toolbar Icon	MNU.000.005
2.3	Hide / Show / Using your Quick Access Toolbar	BPO Screen (leave like this or change like above?)	MNU.000.005
2.4	View Date / Time / Software Version	BPO Screen	MNU.000.003
2.5	Setting and Saving Column Widths	Relevant screen and data grid	MNU.000.003
3	Understanding BPO Screens		
3.1	What is a Title Bar and what does it display?	Relevant screen	MNU.000.003
3.2	Using the Toolbar Action Buttons	Relevant screen	MNU.000.003
3.3	Site Selection	Relevant screen	MNU.000.003
3.4	The Screen Record Filter	Relevant screen	MNU.000.003

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



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