# HUMAN RESOURCES

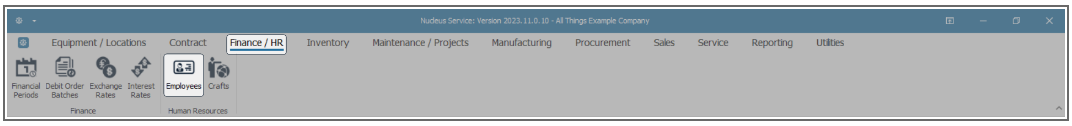
## EMPLOYEES - ADD A NEW EMPLOYEE

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.

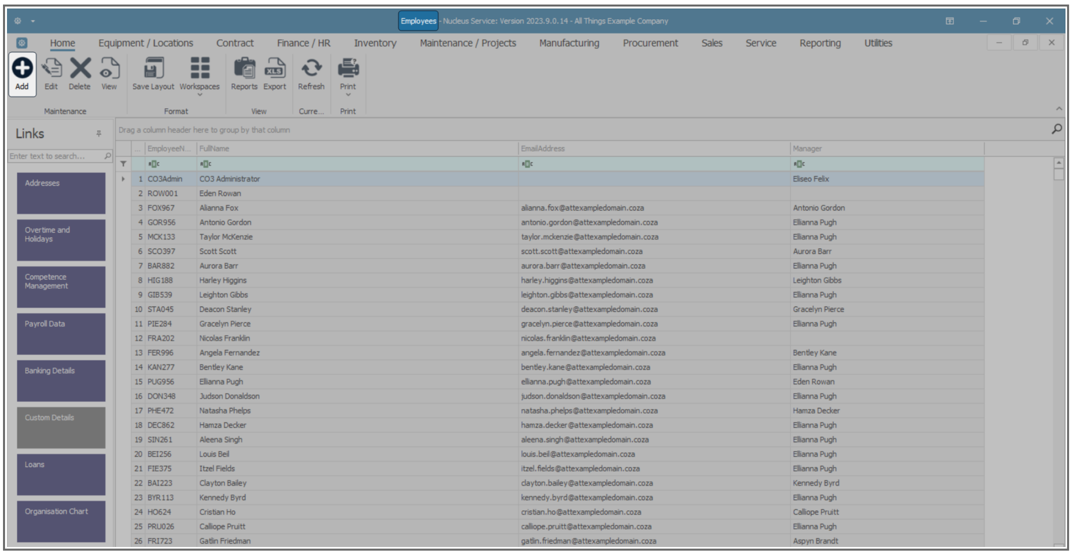
By loading your employee details correctly, you will be able to keep track of employee shifts and manage your Human Resources more efficiently.

### Ribbon Access: Finance / HR Employees

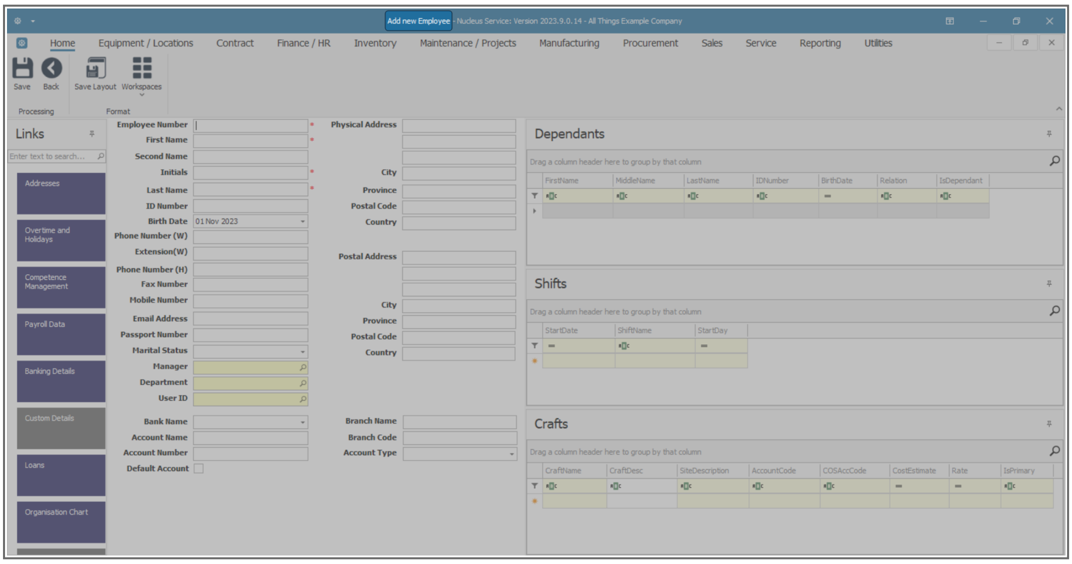



The **Employees** listing screen will display.

- Click on **Add**.




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

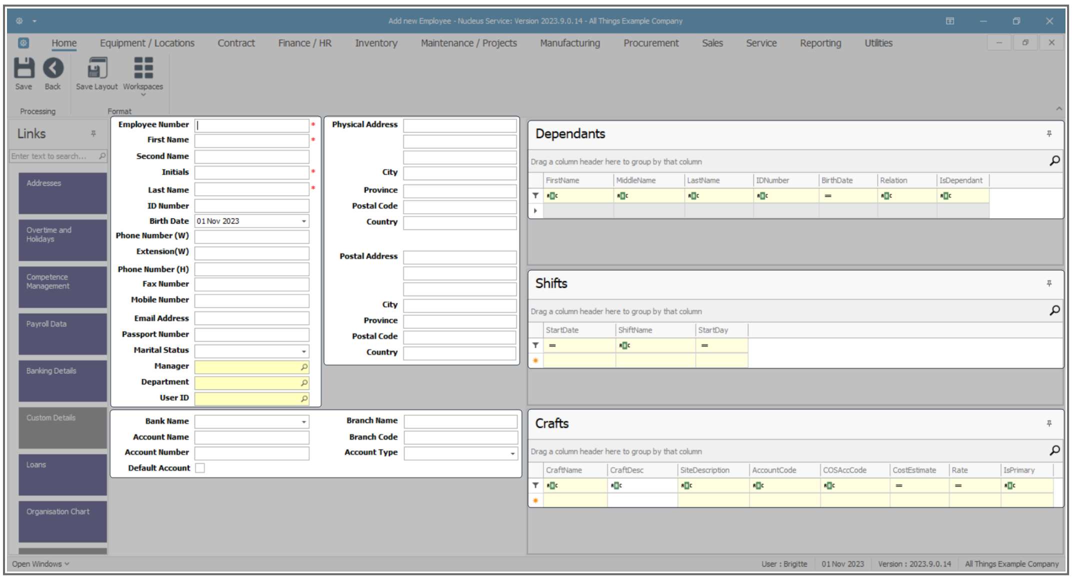



## ADD EMPLOYEE DETAILS

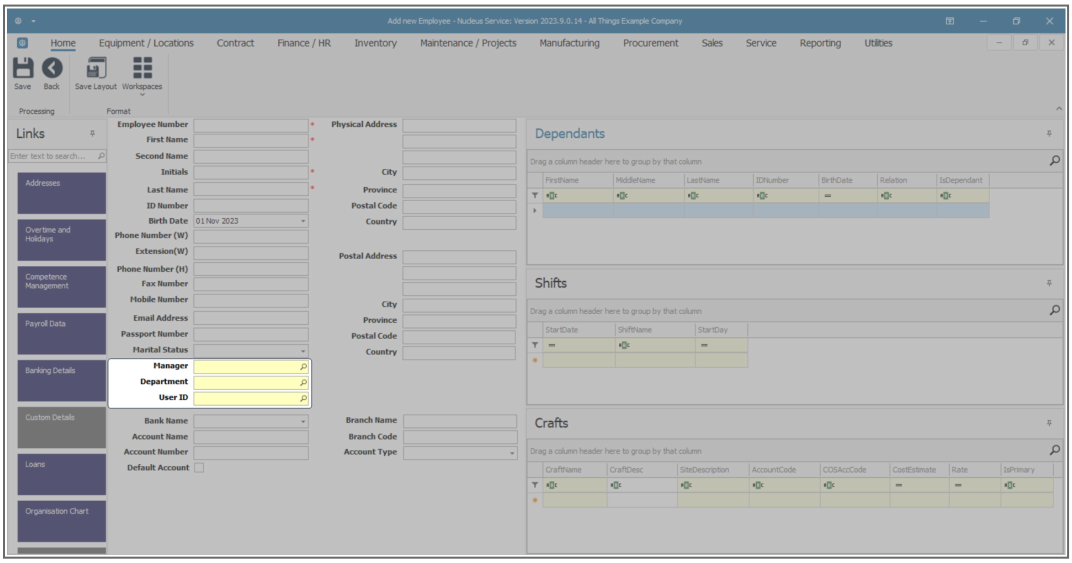
### TYPE THE NEW EMPLOYEE DETAILS IN THE SELF-EXPLANATORY FIELDS:

- 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.

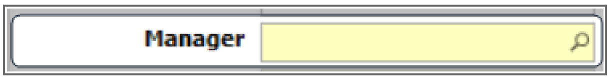


## THE MANAGER, DEPARTMENT AND USER ID FIELDS ARE VERY IMPORTANT:



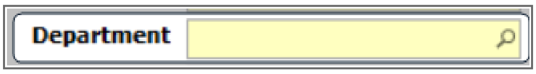

### MANAGER

- 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.

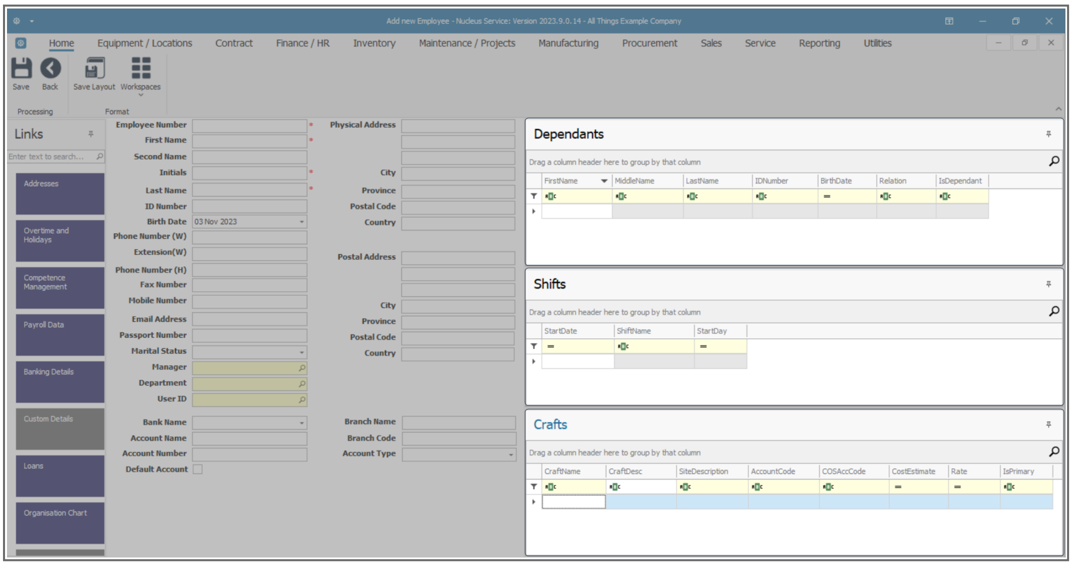


## USER ID

- 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.

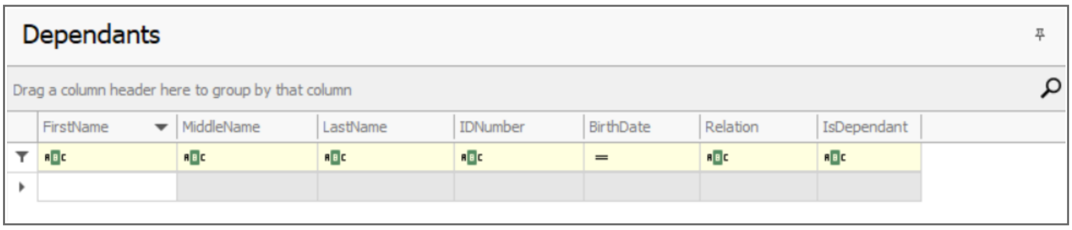
## Move to the right of the screen to the additional information docking panels:

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



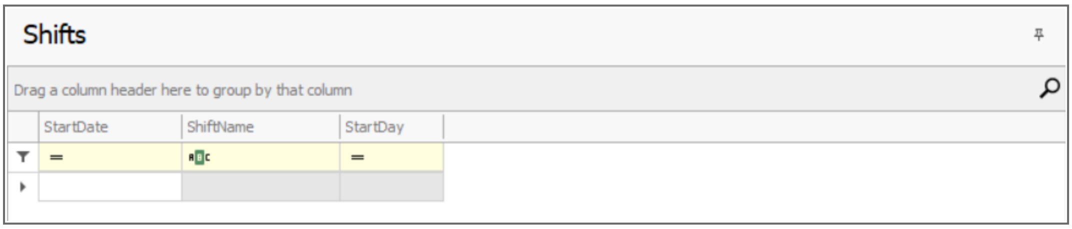

### ADD A DEPENDANT

- 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.



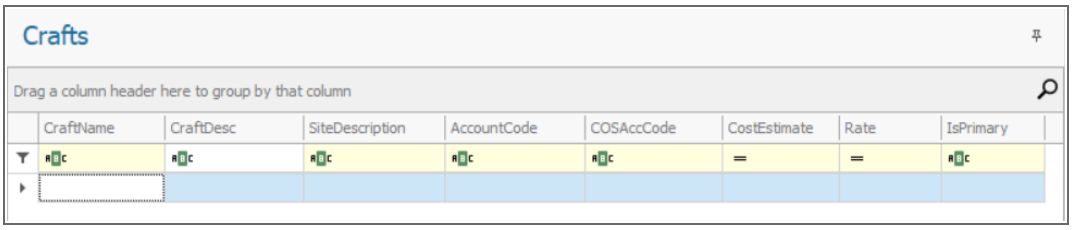

### ADD A SHIFT

- 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.



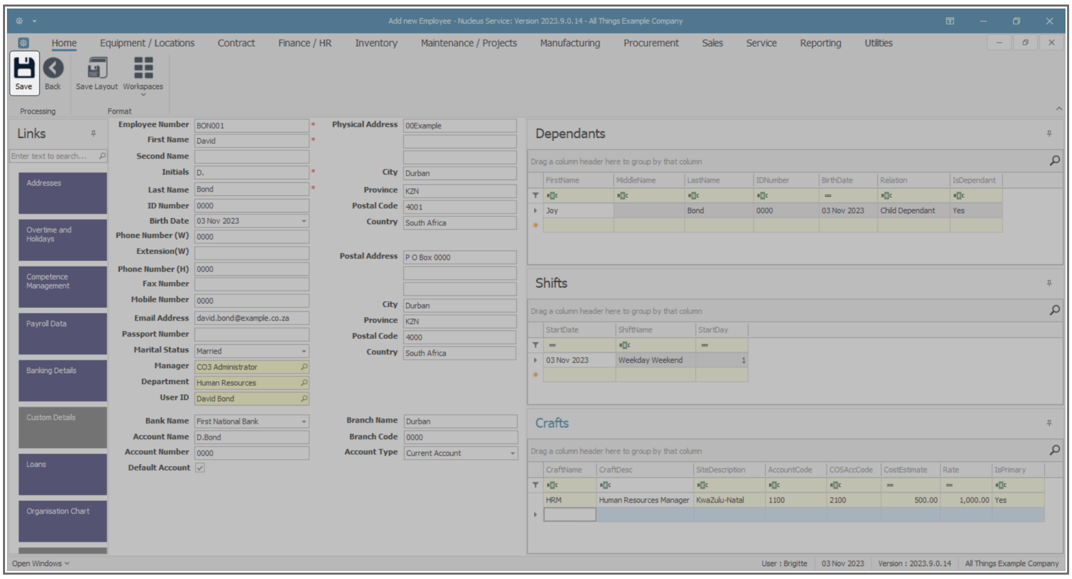

## ADD A CRAFT

- 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**.

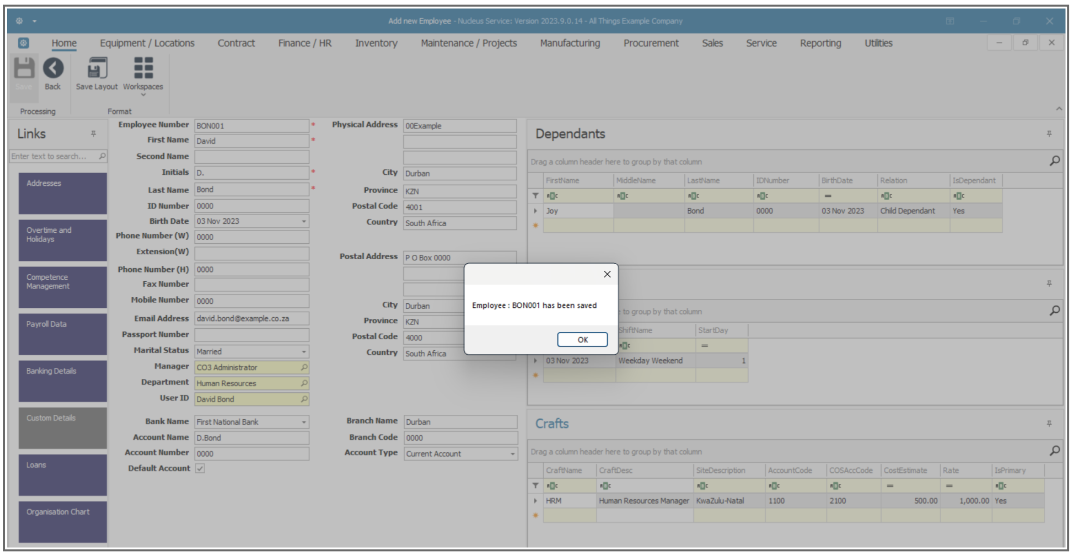



# SAVE NEW EMPLOYEE

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

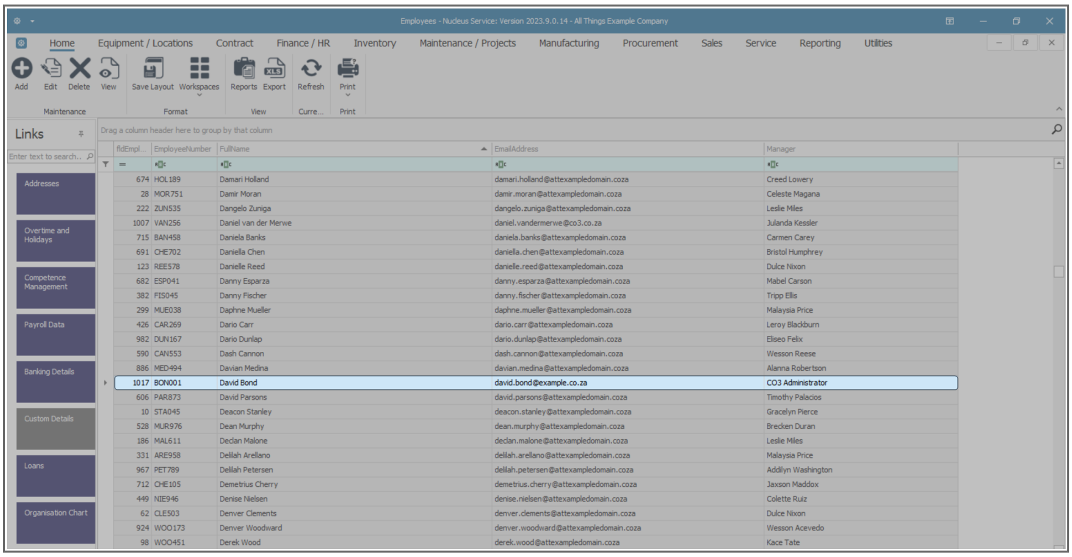


- A message box will pop up advising the following:
    - **Employee: [ ] has been saved.**
- Click on **Ok**.



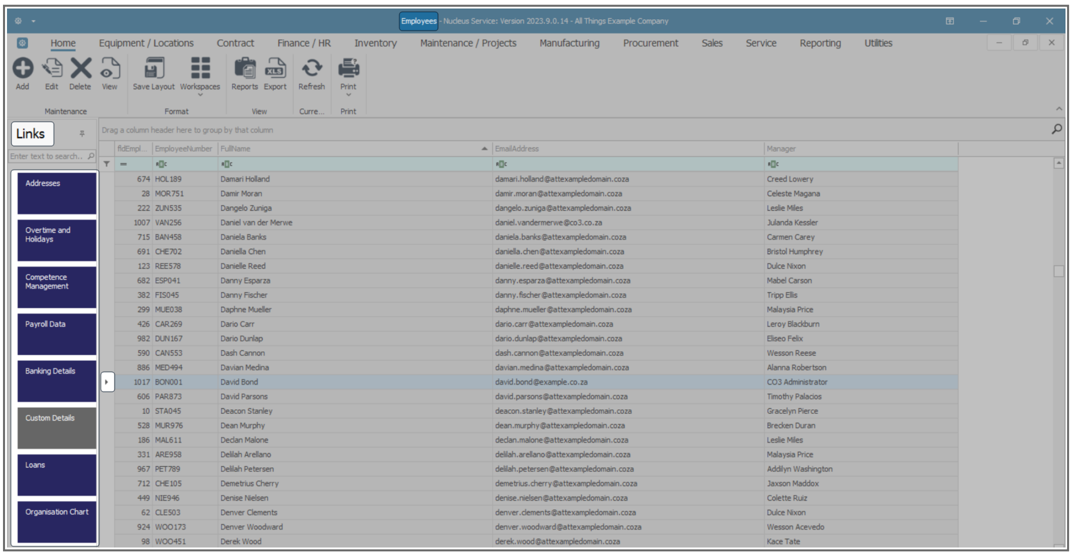
## VIEW NEW EMPLOYEE

- 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.



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