

HUMAN RESOURCES

ASSIGN A USER LOGIN TO AN EMPLOYEE

All employees should be loaded onto Nucleus Service, but only those <u>using</u> <u>Nucleus Service</u> will be assigned a <u>User ID</u>, which is linked to their employee details.

• It is important to ensure that all **users** are correctly linked to their **employee details**.

Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will open.

SELECT EMPLOYEE

- Select the row of the employee to whom you wish to assign a User ID.
- Click on Edit.



| | | Employees - Nucleus Service: | | | |
|---|-----------------------|--|--|-----------------------|--------|
| Home Home Add Edt Delete Maintenance | Equipment / Local | tons Contract Finance / HR Inventory Maintenance / Pro Workgaces Records Export Refesh Prot Wew Uver Dure Prot | jjects Manufacturing Procurement Sales Servi | e Reporting Utilities | - 0 × |
| Links = | Drag a column header | here to group by that column | | | ۶ ۲ |
| | EmployeeN | FullName | EmailAddress | Manager | |
| | Υ # <u>□</u> c | 4[]c | 4[] t | AD: | |
| Addresses | 1 CO3Admin | CO3 Administrator | | Elseo Felx | |
| Houreboes | 2 ROW002 | Eden Rowan | | | |
| | 3 FOX967 | Alianna Fox | alianna.fox@attexampledomain.coza | Antonio Gordon | |
| Question and | 4 GOR956 | Antonio Gordon | antonio.gordon@attexampledomain.coza | Ellianna Pugh | |
| Holidays | 5 MCK133 | Taylor McKenzie | taylor.mckenzie@attexampledomain.coza | Ellianna Pugh | |
| | 6 SCO397 | Scott Scott | scott.scott@attexampledomain.coza | Aurora Barr | |
| | 7 BAR882 | Aurora Barr | aurora.barr@attexampledomain.coza | Ellianna Pugh | |
| Competence Management | 8 HIG188 | Harley Higgins | harley.higgins@attexampledomain.coza | Leighton Gibbs | |
| | 9 GIB539 | Leighton Gibbs | leighton.glbbs@attexampledomain.coza | Ellianna Pugh | |
| | 10 STA045 | Deacon Stanley | deacon.stanley@attexampledomain.coza | Gracelyn Pierce | |
| Payroll Data | 11 PIE284 | Gracelyn Pierce | gracelyn.pierce@attexampledomain.coza | Ellianna Pugh | |
| | 12 FRA202 | Nicolas Franklin | nicolas.franklin@attexampledomain.coza | | |
| | 13 FER996 | Angela Fernandez | angela.fernandez@attexampledomain.coza | Bentley Kane | |
| Banking Details | 14 KAN277 | Bentley Kane | bentley.kane@attexampledomain.coza | Ellianna Pugh | |
| | 15 PUG956 | Ellanna Pugh | elianna.pugh@attexampledomain.coza | Eden Rowan | |
| | 16 DON348 | Judson Donaldson | judson.donaldson@attexampledomain.coza | Ellianna Pugh | |
| Oustom Details | 17 PHE472 | Natasha Phelps | natasha.phelps@attexampledomain.coza | Hamza Decker | |
| Custom Dictons | 18 DEC862 | Hamza Decker | hamza.decker@attexampledomain.coza | Ellianna Pugh | |
| | 19 SIN261 | Aleena Singh | aleena.singh@attexampledomain.coza | Ellianna Pugh | |
| | 20 BEI256 | Louis Bell | louis.beil@attexampledomain.coza | Ellianna Pugh | |
| Loans | 21 FIE375 | Itzel Fields | itzel.fields@attexampledomain.coza | Ellianna Pugh | |
| | 22 BAI223 | Clayton Balley | dayton.bailey@attexampledomain.coza | Kennedy Byrd | |
| | 23 BYR113 | Kennedy Byrd | kennedy.byrd@attexampledomain.coza | Ellianna Pugh | |
| Organisation Chart | 24 HO624 | Cristian Ho | cristian.ho@attexampledomain.coza | Calliope Pruitt | |
| | 25 PRU026 | Callope Pruitt | calliope.pruitt@attexampledomain.coza | Ellianna Pugh | |
| | 26 FRI723 | Gatin Friedman | gatin.friedman@attexampledomain.coza | Aspyn Brandt | |

SEARCH FOR USER ID

- The Edit Employee screen will be displayed.
- Click on the **search** button in the **User ID** field.

| | | | Ec | at Employee - Nucleus Service: Version | | | | | | | | | | |
|--------------------------|---------------------|----------------------|------------------|--|---|-------------|-------------------|-----------------|-----------------|-------------|----------------------|----------------|-----------|-------|
| Back Save Lays | uipment / Locations | s Contract Finance / | HR Inventory | Maintenance / Projects | Mar | nufacturing | Procurement | t Sales | Service Re | porting UI | ilties | | . 0 | × |
| Processing | Employee Number | ROW002 * | Physical Address | | | | | | | | | | | |
| Links * | First Name | Eden + | | | Dep | pendants | | | | | | | | Ψ |
| inter text to search P | Second Name | | | | | | | | | | | | | |
| | Initials | ER * | City | | | | | | | | | | | |
| Addresses | Last Name | Rowan | Province | | Fin | rstName | MiddleName | LastName | IDNumber | | Relation Is | | | |
| | ID Number | | Postal Code | | T 40 | lt. | *Dc | alle | *IIc | - | Alle Al | r | | |
| | Birth Date | 22 Aug 1960 - | Country | | - | | | | | | | | | |
| Overtime and Holidays | Phone Number (W) | | | | | | | | | | | | | |
| | Extension(W) | | Postal Address | | | | | | | | | | | |
| Compatenza | Phone Number (H) | | | | | | | | | | | | | |
| Management | Fax Number | | | | Shi | fts | | | | | | | | ÷ |
| | Mobile Number | | City | | | | | | | | | | 0 | |
| Payrol Data | Email Address | | Province | | | | | | | | | | | |
| | Passport Number | | Postal Code | | 50 | artuate | shirtivame | StartDay | | | | | | |
| | Marital Status | * | Country | | T = | 1ao 2000 | First Shift | | | | | | | |
| Banking Details | Manager | ٩ | | | * | | T BOCOTINC | | - | | | | | |
| | Department | Executive Committee | | | | | | | | | | | | |
| | User ID | | | | | | | | | | | | | |
| Custom Details | Bank Name | * | Branch Name | | Cra | ifts | | | | | | | | Ŧ |
| | Account Name | | Branch Code | | | | | | | | | | | |
| | Account Number | | Account Type | • | Drag a column header here to group by that column | | | | | | | | 2 | |
| Loans | Default Account | | | | | aftName | CraftDesc | SiteDescription | AccountCode | COSAccCode | CostEstimate | Rate | IsPrimary | |
| | | | | | T 10 |)c | a∏c | ∎C . | a∏c | a 🗋 c | - | - | #∐c | - |
| Ornanisation Chart | | | | | > EX | | Executive Manager | Eastern Cape | 1100 | 2100 | 4,000.00 | 4,800.00 | Yes | |
| | | | | | EX | 100 | Executive Manager | Free State | 1100 | 2100 | 4,000.00 | 4,800.00 | Tes | |
| | | | | | EX | | = | | 1100 | 2100 | 4,000.00 | -,800.00 | | |
| | | | | | 4 | | | | | | | | |][>] |
| pen Windows ~ | | | | | | | | | User : Brigitte | 13 Nov 2023 | Version : 2023.9.0.1 | 4 All Things E | example C | ompan |



SELECT USER ID

- The Select the User screen will be displayed.
- Select the **row** of the **UserName** that you would like to allocate to this employee.
 - ° In this example, **Eden Rowan** is selected.
- Click on **OK**.

Note: A User Name / ID cannot be assigned to <u>more than one</u> employee. Ensure that a <u>unique</u> <u>User ID and Login</u> has been set up in the **Configurator** before you attempt to link a User ID to an employee.

| \$ - | 🛛 🔸 🛛 Edit Employee - Nucleus Service: Version 2023.9.0.14 - All Things Example Company 💷 - 🗇 🗙 | | | | | | | | | | | | | | | |
|---------------------------------|---|---------------------|-------|------------------|------------------------------|---------|--------|-------------|------------------|------------------|-------------|------------|------------------|------------|------|---|
| 💿 <u>Home</u> Eq | uipment / Locations | Contract Finar | nce / | HR Inver | tory Maintenance / Pr | ojects | | Manufacturi | ng Procureme | nt Sales | Service Re | porting | Utilities | | - 0 | × |
| Bare Back Some Layout Workposes | | | | | | | | | | | | | | | | |
| Processing F | ormat | | | | | | - | | | | | _ | | | | ^ |
| Links ÷ | Employee Number | ROW002 | 1 | Select the User | | | | | | | - 🗆 × | | | | | 7 |
| | First Name | Eden | | lome | | | | | | | | | | | | |
| Enter text to search P | Second Name | | 17 | | | | | | | | | | | | | Q |
| Addresses | Initials | ER | 16 | | | | | | | | | InthDate | | sDependant | | |
| 10010000 | Last Name | Rowan | Ľ | k Back Sa | ve Layout | | | | | | | - | *[] C | C c | | |
| | ID Number | | | Process | Format | | | | | | | ^ | | | | |
| Overtime and | Birth Date | 22 Aug 1960 | | | | | | | | | | 0 | | | | |
| Holidays | Phone Number (W) | | | | | | | | | | | | | | | |
| | Extension(W) | | | UserName | UsertulName | Employ | | | mployeehirstName | EmployeeLastName | Description | | | | | |
| Competence | Phone Number (H) | | Ľ | N()C | all c | *[]c | | | (Dc | NDC | *[]c | | | | | |
| Management | Fax Number | | | Practical Test P | Practical Test Boot Tech | | | | | | | | | | | 7 |
| | Mobile Number | | | You001 | Karlien Young Dunnaway Svens | | | | | | | | | | | 0 |
| Payrol Data | Email Address | | 5 | ROW001 | Eden Rowan | Eden R | owan | | iden | Rowan | | ۱ – | | | | ~ |
| | Passport Number | | | John | John Chase | John Cl | ase | | iohn | Chase | | | | | | |
| | Marital Status | | 1 | David Bond | David Bond | David B | ond | 1 | David | Bond | | | | | | |
| Banking Details | Manager | | | James | James Johnson | James 3 | lohnse | on : | lames | Johnson | | | | | | |
| | Department | Executive Committee | | | | | | | | | | | | | | |
| | User ID | | L. | | | _ | _ | | | | Þ | | | | | |
| Custom Details | Bank Name | | - | Branch | lame | | 6 | | | | | | | | | |
| | Account Name | | | Branch | Code | | | laits | | | | | | | | 1 |
| | Account Number | | | Account | Type | - | | | | | | | | | | Q |
| Loans | Default Account | | | | | | | | | | | | odo CostEstimato | | | |
| | | | | | | | T | sTIC | entracesc | elle | *Elc | ATTC | = | = | elle | |
| | | | | | | | | EXCO | Executive Manage | r Eastern Cape | 1100 | 2100 | 4.000.0 | 0 4.800.00 | Yes | |
| Organisation Chart | | | | | | | | EXCO | Executive Manage | r Free State | 1100 | 2100 | 4,000.0 | 0 4,800.00 | Yes | |
| | | | | | | | | EXCO | Executive Manage | er Gauteng | 1100 | 2100 | 4,000.0 | 0 4,800.00 | Yes | |
| | | | | | | | 4 | | | | | | | | | × |

SAVE USER ID/LOGIN DETAILS

- The new User ID / Login is now assigned and displayed in the User ID field.
- Click on **Save** to keep the User ID detail.



| φ - | | | | | | | | | | | | | | |
|----------------------|-------------------------------|---------------------|--------------------|------------------------|---------|----------------------|-----------------------|-----------------|-------------|--------------|--------------|----------|-----------|------|
| Back Save La | ouipment / Location | s Contract Finar | nce / HR Inventory | Maintenance / Projects | 1 | Manufacturing | Procuremen | t Sales | Service Re | porting Util | ties | | - 0 | × |
| Links * | Employee Number First Name | ROW002 | Physical Address | | D | Dependants | | | | | | | | 4 |
| Enter text to search | Second Name | | | | Dra | ig a column header l | nere to group by that | : column | | | | | | Q |
| Addresses | Initials | ER | • City | | | | | | | | | | | |
| - 100 656 | Last Name | Rowan | Province | | T | a 🛛 c | •Qc | 10: | *D: | - | 4[]C 4 |)c | | |
| | ID Number | | Postal Code | | + | | | | | | | | | |
| Overtime and | Birth Date | 22 Aug 1960 | * Country | | | | | | | | | | | |
| Holidays | Phone Number (W) | | | | | | | | | | | | | |
| | Extension(W) | | Postal Address | | | | | | | | | | | |
| Competence | Phone Number (H) | | | | S | hifte | | | | | | | | 2 |
| Managanian | Mobile Number | | - L | | _ | | | | | | | | | |
| | Email Address | | City | | Dra | ag a column header l | nere to group by that | column | | | | | | Q |
| Payroll Data | Passport Number | | Province | | | StartDate | ShiftName | StartDay | | | | | | |
| | Marital Status | | * Country | | ٣ | - | *D< | - | | | | | | |
| Ranking Datale | Manager | | 2 | | + | 03 Jan 2000 | First Shift | 1 | | | | | | |
| banking becais | Department | Executive Committee | P | | * | | | | | | | | | |
| | User ID | ROW001 | P | | | | | | | | | | | |
| Custom Details | Bank Name | | + Branch Name | | С | Crafts | | | | | | | | 7 |
| | Account Name | | Branch Code | | | | | | | | | | | 0 |
| Loage | Account Number | | Account Type | * | | | | | | | | | | Q |
| | Default Account | | | | | CraftName | CraftDesc | SiteDescription | AccountCode | COSAccCode | CostEstimate | Rate | IsPrimary | |
| | | | | | T. | NIIC EXCO | Fire the Manager | Factors Cana | NDC | 80c | 4 000 00 | 4 900.00 | NEK | ^ |
| Organisation Chart | | | | | 1 | EXCO | Executive Manager | Eastern Cape | 1100 | 2100 | 4,000.00 | 4,800.00 | Yes | |
| | | | | | | EXCO | Executive Manager | Gauteng | 1100 | 2100 | 4,000.00 | 4,800.00 | Yes | |
| | | | | | - | | | | | | | | | - |
| | | | | | ALC: NO | | | | | | | | | 11 C |

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

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|------------------------|---|---------------------|--------------------------------------|------------------------|------|---------------------|-----------------------|-----------------|------------------|--------------|----------------------|---------------|------------|--------|
| B Home E | quipment / Location | s Contract Fin | nance / HR Inventory | Maintenance / Projects | N | Manufacturing | Procurement | t Sales | Service Rej | porting U | tilties | | - 0 | × |
| Back Save Lay | out Workspaces | | | | | | | | | | | | | ~ |
| 1 July | Employee Number | ROW002 | Physical Address | | - | | | | | | | | | |
| LINKS * | First Name | Eden | • | | D | ependants | | | | | | | | * |
| Enter text to search P | Second Name | | | | Dra | g a column header l | here to group by that | t column | | | | | | Q |
| Addressee | Initials | ER | * City | | | | | | | | | | | |
| HUGICASICA | Last Name | Rowan | Province | | Ŧ | a∏c | *[]c | ∎∐c | a∏c | - | *[]c *[] | k l | | |
| | ID Number | | Postal Code | | ÷. | | | | | | | | | |
| Overtime and | Birth Date | 22 Aug 1960 | - Country | | | | | | | | | | | |
| Holdays | Phone Number (W) | | | | | | | | | | | | | |
| | Phone Number (H) | | Postal Address | | | | | | | | | | | |
| Competence | Fax Number | | | | | | × | | | | | | | 7 |
| Handgemente | Mobile Number | | City (| Farley DO | | | | | | | | | | |
| | Email Address | | Province | Employee: KOV | V002 | has been saved | to group by that | t column | | | | | | Q |
| Payroi Data | Passport Number | | Postal Code | | | Or | ShiftName | StartDay | | | | | | |
| | Marital Status | | - Country | | _ | | | - | | | | | | |
| Banking Details | Manager | | P | | • | 03 Jan 2000 | First Shift | | 1 | | | | | |
| | Department | Executive Committee | P | | 1 | | | | | | | | | |
| | User ID | ROW001 | P | | | | | | | | | | | |
| Custom Details | Bank Name | | Branch Name | | C | rafts | | | | | | | | |
| | Account Name | | Branch Code | | _ | | | | | | | | | |
| | Account Number | | Account Type | * | Dra | g a column header l | here to group by that | t column | | | | | | Q |
| Loans | Default Account | | | | | CraftName | CraftDesc | SiteDescription | AccountCode | COSAccCode | CostEstimate | Rate | IsPrimary | |
| | | | | | Ŧ | n⊡c | a∏c | € C | all c | a∏c | - | - | #∐c | ^ |
| Organization Chart | | | | | • | EXCO | Executive Manager | Eastern Cape | 1100 | 2100 | 4,000.00 | 4,800.00 | Yes | |
| organisation chart | | | | | | EXCO | Executive Manager | Free State | 1100 | 2100 | 4,000.00 | 4,800.00 | Yes | |
| | | | | | | = | = | | 1100 | 2100 | 4,000.00 | -,800.00 | | |
| Ones Windows v | 1 | | | | | | | | Lines - Deletter | 12 Mar. 2022 | Version - 2022 0.0.1 | A All Thinses | Europele C | |
| open windows ~ | | | | | | | | | User : angitte | 13 NOV 2023 | version : 2023.9.0.1 | At Inngs | example C | umpany |

• You will return to the **Employees** listing screen.

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