

# HUMAN RESOURCES

## EMPLOYEES – OVERTIME AND HOLIDAYS

The Overtime and Holidays tile in the **Employees** listing screen will direct you to the **Availability Exceptions** listing screen.

**Availability Exceptions** are any changes to an employee's standard availability: time that the employee is unavailable when usually available or time when the employee is available when usually unavailable.

In Nucleus Service, employee **Availability Exceptions** can be used to specify:

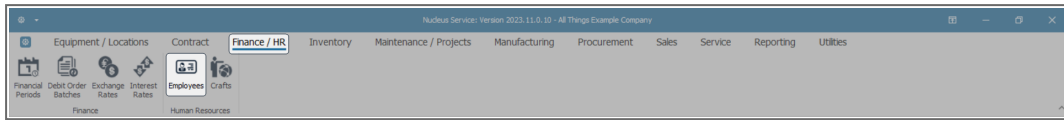
- The number of unavailable labour hours for each day that an employee will not be present or available during their usual working hours.
  - An **Unavailable** exception may be used to reflect an employee taking annual leave or compassionate leave.
- The number of labour hours for each day that the employee will be available and present outside of their usual working hours.
  - An **Available** exception may be used to reflect an employee being able to work when they are not usually available or required, e.g. on a public holiday.

These exceptions can be recorded from the **Employees** listing screen.

[Availability Exceptions](#) for employees who are also [Technicians](#) can also be recorded in the Nucleus Service **Service** module - click on the links for further information.

If an employee is also a Technician, any edits made to the Availability Exceptions from either the **HR** module or the **Service** module will reflect in the other module screens.

## Ribbon Access: Finance / HR Employees

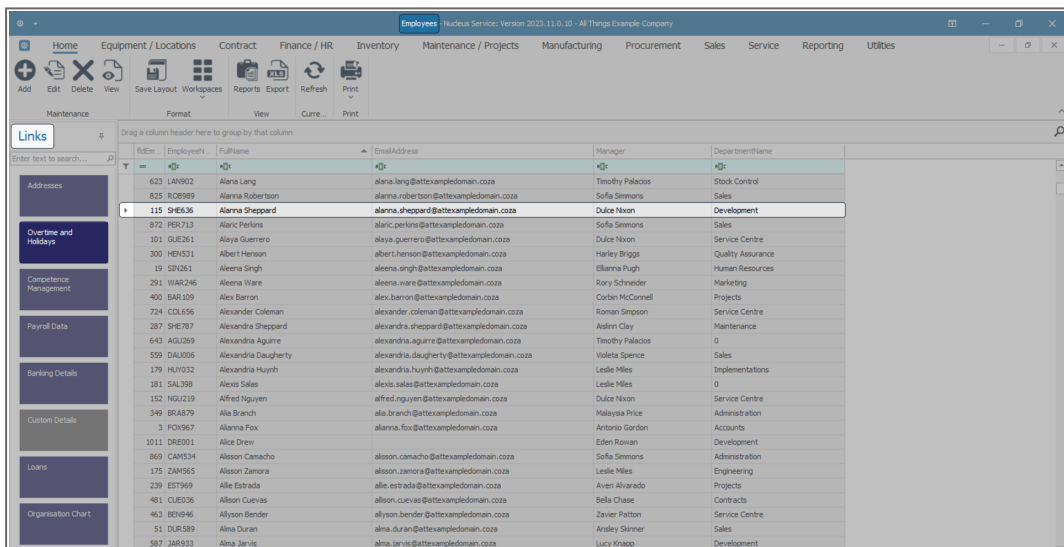


The **Employees** listing screen will display.

## VIEW EMPLOYEE AVAILABILITY EXCEPTIONS

### SELECT EMPLOYEE

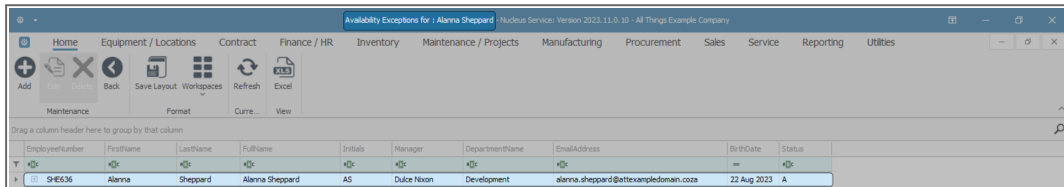
- Select the **row** of the employee whose availability exceptions schedule you wish to **view**.
- Click on the **Overtime and Holidays** tile in the **Links** panel.



- The **Availability Exceptions for : [ ]** screen will open where you can **view** the selected employee's details in the data grid.
- To view the employee's availability exceptions you will need to open the data sub grid.  
To do this, click on the **expand** button in the row of the employee.

- Note: In this example, the employee has no exceptions currently linked. The **expand** button in front of the employee name appears **feint**, indicating that no data has been recorded yet in the sub grid.

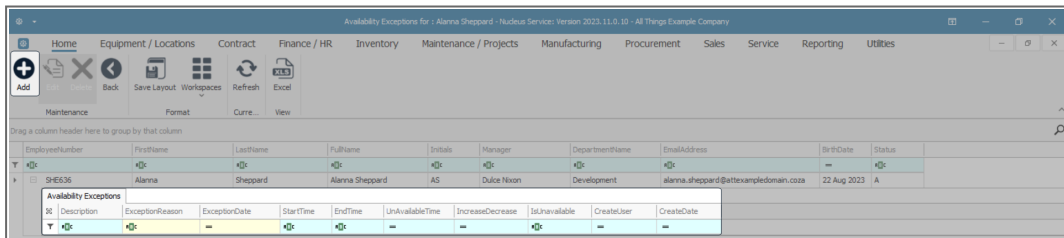
If the **expand** button is **bold**, then content is available for viewing.



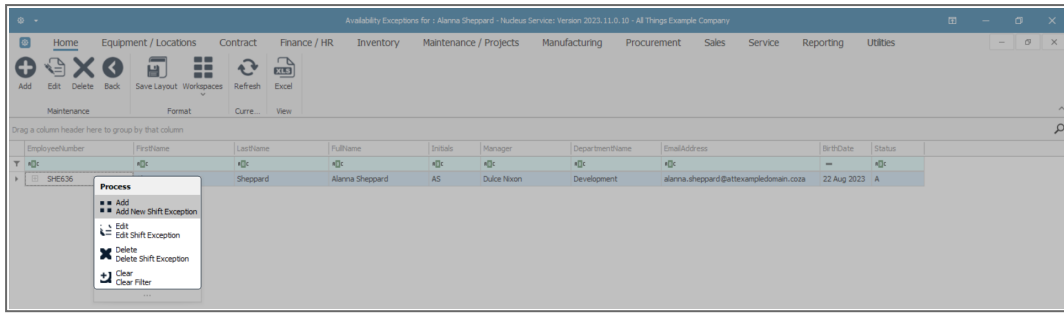
- The **Availability Exceptions** sub grid will open. This sub grid will list all of the exceptions currently linked to the employee.
- You can see in this example that there is no content in this sub grid.

## ADD EMPLOYEE AVAILABILITY EXCEPTION

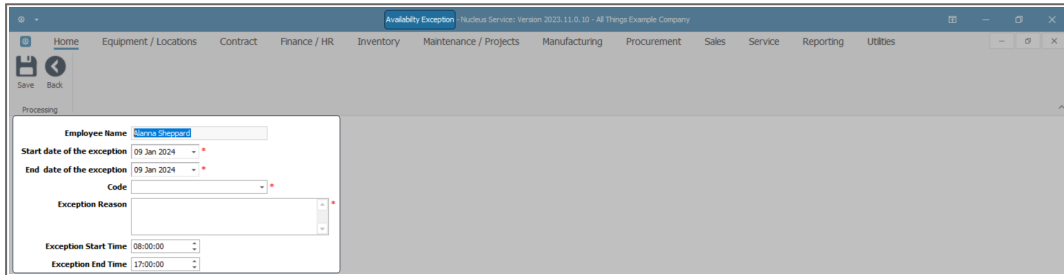
- Click on **Add**.



- Or right-click on any row in the data grid.
- A **Process** menu will pop up.
- Click on **Add New Shift Exception**.



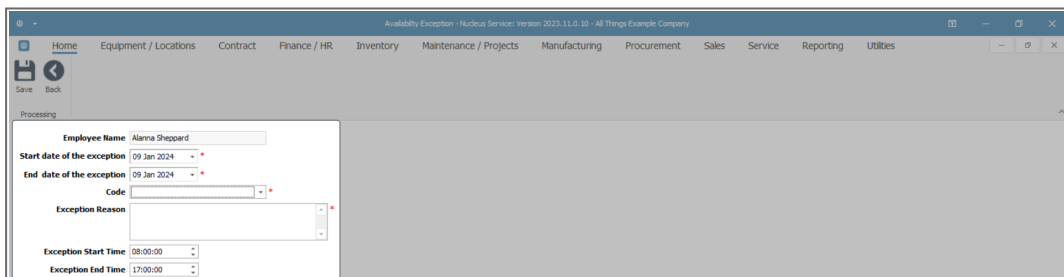
- The **Availability Exception** screen will open.



## ADD EXCEPTION DETAILS

- Select from the drop-down menus or type directly into the fields, the availability exception details:
  - **Employee Name:** This will be populated with the name of the employee initially selected.
  - **Start date of the exception:** This will auto populate with the current date.
    - Either type in or click on the drop-down arrow and use the calendar function to select an alternative start date, if required.
  - **End date of the exception:** This will auto populate with the current date.
    - Either type in or click on the drop-down arrow and use the calendar function to select an alternative end date, if required.

- **Code:** Click on the drop-down arrow and select from the list, the appropriate exception reason code, e.g. 'Annual Leave'.
- **Exception Reason:** Type in this text box, the detail as to why this exception is occurring.
- **Exception Start Time:** This will auto populate with the 'normal' working day start time (08:00:00).
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative exception start time, if required.
- **Exception End Time:** This will auto populate with the normal working day end time (17:00:00).
  - Either type in or click on the drop-down arrow and use the calendar function to select an alternative exception end time, if required.



The screenshot shows a web application window titled 'Availability Exception - Nuclear Services - Version 2024.11.0.03 - All Things Example Company'. The navigation menu includes Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The main content area shows a form for 'Alanna Sheppard' with the following fields: 'Start date of the exception' (09 Jan 2024), 'End date of the exception' (09 Jan 2024), 'Code' (empty), 'Exception Reason' (empty), 'Exception Start Time' (08:00:00), and 'Exception End Time' (17:00:00). The form is in a 'Processing' state.

### SAVE EXCEPTION DETAILS

- When all the Availability Exception **dates, times** and **reasons** have been added -
- Click on **Save**.
- Note that in this example, the availability exception period (**Start** and **End Date**) is for **4** consecutive 'normal' labour days.

- An **Exception Complete** message box will pop up informing you -
  - **Availability Exception has been saved.**
- Click on **OK**.

- You will return to the **Availability Exceptions for : [ ]** screen where the recent exceptions will appear in the **Availability Exceptions** sub grid.
- You will note that **each day** of the exception period is recorded on a separate line.

Description	ExceptionReason	ExceptionD...	StartTime	EndTime	UnavailableTime	Increase/Decrease	IsUnavailable	CreateUser	CreateDate
Business Trip	Training	09 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	10 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	11 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	12 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024

- Click on **Back** to return to the Employees listing screen.

## VIEW EXCEPTION DETAILS

### SELECT EMPLOYEE

- In the **Employees** listing screen,
- Select the **row** of the employee whose availability exceptions schedule you wish to **view**.
- Click on the **Overtime and Holidays** tile.

EmployeeID	EmployeeID	FullName	EmailAddress	Manager	DepartmentName
623	LAN902	Alana Lang	alana.lang@texampledomain.co.za	Timothy Palacos	Stock Control
825	ROE989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofa Simmons	Sales
115	SHE636	Alanna Sheppard	alanna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alaric Perkins	alaric.perkins@texampledomain.co.za	Sofa Simmons	Sales
101	GRE261	Alaya Guerrero	alaya.guerrero@texampledomain.co.za	Dulce Nixon	Service Centre
300	HEI531	Albert Henson	albert.henson@texampledomain.co.za	Harley Briggs	Quality Assurance
19	SDN261	Aleena Singh	aleena.singh@texampledomain.co.za	Ellanna Pugh	Human Resources
291	WAI246	Aleena Ware	aleena.ware@texampledomain.co.za	Rory Schneider	Marketing
400	BAR109	Alex Barron	alex.barron@texampledomain.co.za	Corbin McCannell	Projects
724	COL656	Alexander Coleman	alexander.coleman@texampledomain.co.za	Roman Simpson	Service Centre
287	SHE787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Aidlin Clay	Maintenance
643	AGU269	Alexandria Aguirre	alexandria.aguirre@texampledomain.co.za	Timothy Palacos	0
559	DAU006	Alexandria Daugherty	alexandria.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HUY032	Alexandria Huynh	alexandria.huynh@texampledomain.co.za	Leslie Miles	Implementations
181	SAL398	Alexis Salas	alexis.salas@texampledomain.co.za	Leslie Miles	0
152	NGU219	Alfred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre
340	BR4879	Alia Branch	alia.branch@texampledomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@texampledomain.co.za	Antonio Gordon	Accounts
1011	DRE001	Alice Drew	alice.drew@texampledomain.co.za	Eden Rowan	Development
869	CAM534	Allison Camacho	allison.camacho@texampledomain.co.za	Sofa Simmons	Administration
175	ZAM565	Allison Zamora	allison.zamora@texampledomain.co.za	Leslie Miles	Engineering
239	EST969	Alle Estrada	alle.estrada@texampledomain.co.za	Averi Alvarado	Projects
481	CUE036	Allison Cuevas	allison.cuevas@texampledomain.co.za	Bela Chase	Contracts
463	BEH646	Alyson Bender	alyson.bender@texampledomain.co.za	Zavier Patton	Service Centre
51	DUR589	Alma Duran	alma.duran@texampledomain.co.za	Anisley Skinner	Sales
587	JAR933	Alma Jarvis	alma.jarvis@texampledomain.co.za	Lucy Knepp	Development

- The **Availability Exceptions for : [ ]** screen will open.
- View the exception by clicking on the **expand** icon to display the Availability Exceptions sub grid.

EmployeeNumber	FirstName	LastName	FullName	Initials	Manager	DepartmentName	EmailAddress	BirthDate	Status
115	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@texampledomain.co.za	22 Aug 2023	A

- The **Availability Exceptions** sub grid will open.
- Click on **Back** to return to the Employees listing screen

EmployeeNumber	FirstName	LastName	FullName	Initials	Manager	DepartmentName	EmailAddress	BirthDate	Status
SHE636	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@attexamplomain.co.za	22 Aug 2023	A

Description	ExceptionReason	ExceptionID	StartTime	EndTime	UnavailableTime	IncreaseDecrease	IsUnavailable	CreateUser	CreateDate
Business Trip	Training	09 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	10 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	11 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	12 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024

## EXPORT TO EXCEL

- In the **Availability Exceptions for : [ ]** screen.
- Click on **Excel**.

EmployeeNumber	FirstName	LastName	FullName	Initials	Manager	DepartmentName	EmailAddress	BirthDate	Status
SHE636	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@attexamplomain.co.za	22 Aug 2023	A

- This will open MS Excel with a new spreadsheet and load all the data from the data grid into that spreadsheet.
- You can then save, view, search for data, prepare it for printing, etc, as required.

EmployeeNumber	FirstName	LastName	FullName	Initials	Manager	DepartmentName	EmailAddress	BirthDate	Status
SHE636	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@attexamplomain.co.za	22 Aug 2023	A



## EDIT EMPLOYEE AVAILABILITY EXCEPTION

### SELECT EMPLOYEE

- In the **Employees** listing screen.
- Select the **row** of the employee whose availability exception you wish to **change**.
- Click on the **Overtime and Holidays** tile.

Employee#	Full Name	Email Address	Manager	Department Name
623 LAN902	Alana Lang	alana.lang@tattexampdomain.co.za	Timothy Palacios	Stock Control
825 ROB989	Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofia Simmons	Sales
115 SHE636	Alanna Sheppard	alanna.sheppard@tattexampdomain.co.za	Dulce Nixon	Development
872 PER713	Alaric Perkins	alaric.perkins@tattexampdomain.co.za	Sofia Simmons	Sales
101 GUE261	Alaya Guerrero	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300 HEN531	Albert Henson	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19 SIN261	Aleena Singh	aleena.singh@tattexampdomain.co.za	Ellanna Pugh	Human Resources
291 WAI246	Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
400 BAR109	Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McCannell	Projects
724 COL656	Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
287 SHE787	Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Aidlin Clay	Maintenance
643 AGU269	Alexandria Aguirre	alexandria.aguirre@tattexampdomain.co.za	Timothy Palacios	0
559 DAU006	Alexandria Daugherty	alexandria.daugherty@tattexampdomain.co.za	Violeta Spence	Sales
179 HUJ032	Alexandria Huynh	alexandria.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181 SAL398	Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152 NGU219	Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
340 BRAB79	Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
3 FOX967	Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011 DRE001	Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
869 CAM534	Allison Camacho	allison.camacho@tattexampdomain.co.za	Sofia Simmons	Administration
175 ZAM565	Allison Zamora	allison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
239 EST969	Alle Estrada	alle.estrada@tattexampdomain.co.za	Averi Alvarado	Projects
481 CUE036	Allison Cuevas	allison.cuevas@tattexampdomain.co.za	Bela Chase	Contracts
463 BEK946	Alyson Bender	alyson.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51 DUR589	Alma Duran	alma.duran@tattexampdomain.co.za	Anisley Skinner	Sales
587 JAR933	Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knepp	Development

- The **Availability Exceptions for: [ ]** screen will open.
- **Important Note:** Upon opening, the **Edit** and **Delete** buttons are inactive (greyed out) in this screen.  
The Availability Exceptions **sub grid** must be opened first and then the **Edit** and **Delete** buttons will be activated (bold).
- Click on the **expand** button in the row of the employee.

Employee Number	First Name	Last Name	Full Name	Initials	Manager	Department Name	Email Address	Birth Date	Status
115 SHE636	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@tattexampdomain.co.za	22 Aug 2023	A

- The **Availability Exceptions** sub grid will open.

## SELECT EXCEPTION TO EDIT

- Select the **row** of the exception that you wish to change.
- Click on **Edit**.

#	Description	ExceptionReason	ExceptionID	StartTime	EndTime	UnAvailableTime	IncreaseDecrease	IsInavailable	CreateUser	CreateDate
1	Business Trip	Training	09 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
	Business Trip	Training	10 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
	Business Trip	Training	11 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
	Business Trip	Training	12 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024

- Or **right-click** on the row you wish to edit.
- A **Process** menu will pop up.
- Click on **Edit Shift Exception**.

#	Description	ExceptionReason	ExceptionID	StartTime	EndTime	UnAvailableTime	IncreaseDecrease	IsInavailable	CreateUser	CreateDate
1	Business Trip	Training	09 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024
	Business Trip	Training	10 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024
	Business Trip	Training	11 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024
	Business Trip	Training	12 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024

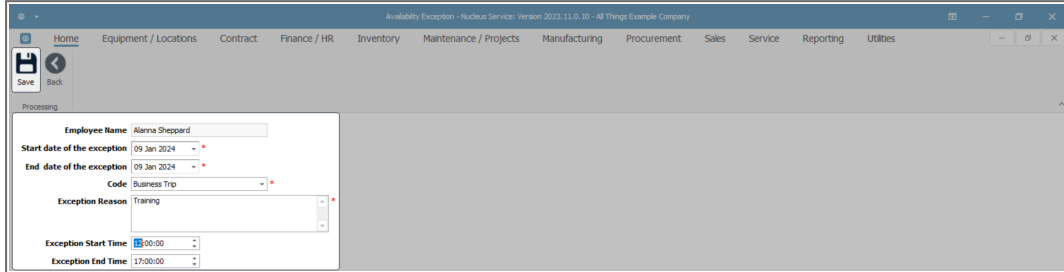
- The **Availability Exception** screen will open.

## EDIT EXCEPTION DETAILS

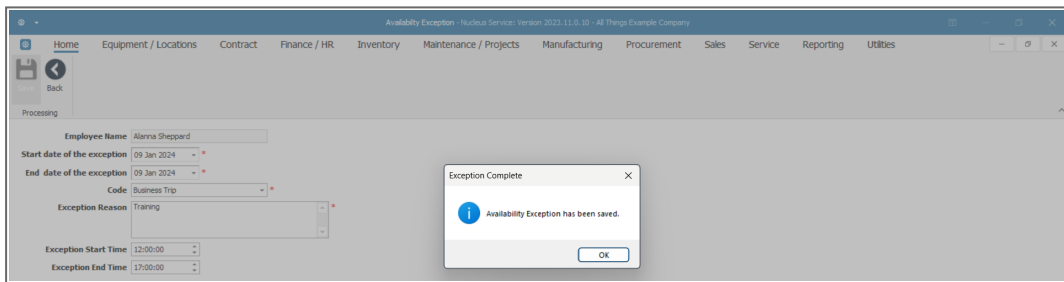
- You can edit any of the details in this screen apart from the Employee Name.
- In this example, the **Exception Start Time** is to be changed to **12:00.00**.

## SAVE EDITED DETAILS

- When you have finished making the required changes, click on **Save**.



- An **Exception Complete** message box will pop up informing you -
  - **Availability Exception has been saved.**
- Note that the **Exception Start Time** is now **12:00:00**.
- Click on **OK**.



## VIEW EDITED EXCEPTION

- You will return to the **Availability Exceptions for: [ ]** screen.
- The changes can be viewed in the sub grid.
- Click on **Back** to return to the **Employees** listing screen.

Description	Exception Reason	Exception ID	Start Time	End Time	Unavailable Time	Increase/Decrease	Is Available	Create User	Create Date
Business Trip	Training	09 Jan 2024	12:00:00	17:00:00	5.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	10 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	11 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024
Business Trip	Training	12 Jan 2024	08:00:00	17:00:00	9.00	-1	Yes	10011	09 Jan 2024

## DELETE EMPLOYEE AVAILABILITY EXCEPTION

### SELECT EMPLOYEE

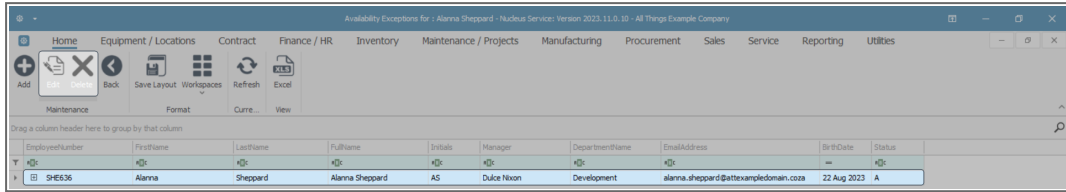
- In the **Employees** listing screen -
- Select the **row** of the employee whose availability exception you wish to **delete**.
- Click on the **Overtime and Holidays** tile.

Employee ID	Full Name	Email Address	Manager	Department Name
825	Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofia Simmons	Sales
115	<b>Alanna Sheppard</b>	<b>alanna.sheppard@tattexampdomain.co.za</b>	Dulce Nixon	Development
872	Alicia Perkins	alicia.perkins@tattexampdomain.co.za	Sofia Simmons	Sales
101	Alaya Guerrero	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300	Albert Herson	albert.herson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19	Aleena Singh	aleena.singh@tattexampdomain.co.za	Elanna Pugh	Human Resources
291	Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schneider	Marketing
400	Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McConnell	Projects
724	Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Roman Simpson	Service Centre
287	Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Adam Clay	Maintenance
643	Alexandra Agarie	alexandra.agarie@tattexampdomain.co.za	Timothy Palacios	0
559	Alexandra Daugherty	alexandra.daugherty@tattexampdomain.co.za	Violeta Spence	Sales
179	Alexandra Huynh	alexandra.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181	Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152	Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
349	Alia Branch	alia.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
1011	Alice Drew	alice.drew@tattexampdomain.co.za	Eden Rowan	Development
869	Alisson Camacho	alison.camacho@tattexampdomain.co.za	Sofia Simmons	Administration
175	Alison Zamora	alison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
239	Allie Estrada	allie.estrada@tattexampdomain.co.za	Arini Alvarado	Projects
481	Allison Cuevas	alison.cuevas@tattexampdomain.co.za	Bella Chase	Contracts
463	Alyson Bender	alyson.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51	Alma Duran	alma.duran@tattexampdomain.co.za	Ansley Skinner	Sales
587	Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development
75	Alondra Dyer	alondra.dyer@tattexampdomain.co.za	Dulce Nixon	Implementations

- The **Availability Exceptions for: [ ]** screen will open.
- **Important Note:** Upon opening, the **Edit** and **Delete** buttons are inactive (greyed out) in this screen. The **Availability Exceptions sub grid** must be opened first and then the **Edit** and **Delete** but-

tons will be activated (bold).

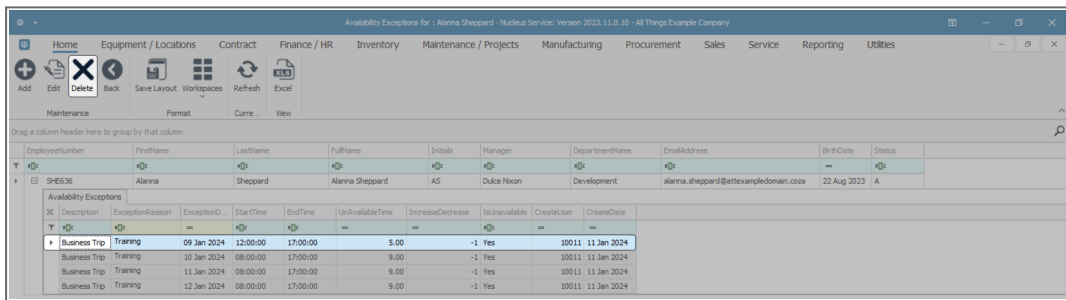
- Click on the **expand** button in the row of the employee.



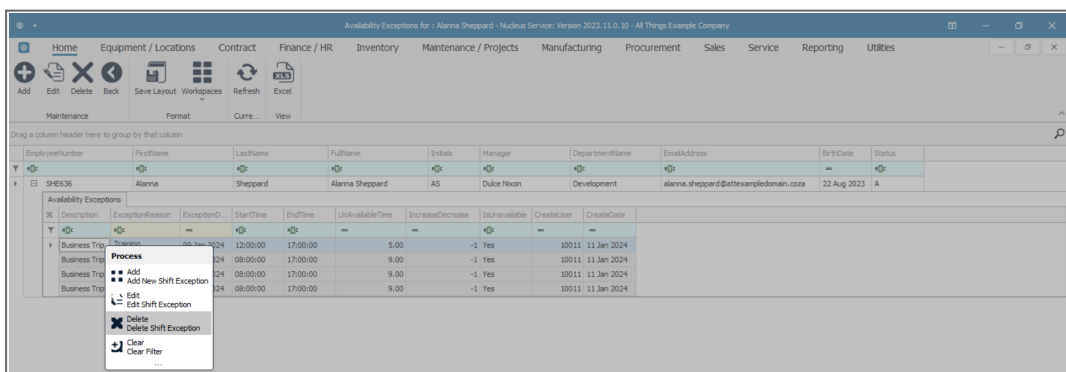
- The **Availability Exceptions** sub grid will open.

## SELECT EXCEPTION TO DELETE

- Select the **row** of the particular exception that you wish to remove.
- Click on **Delete**.

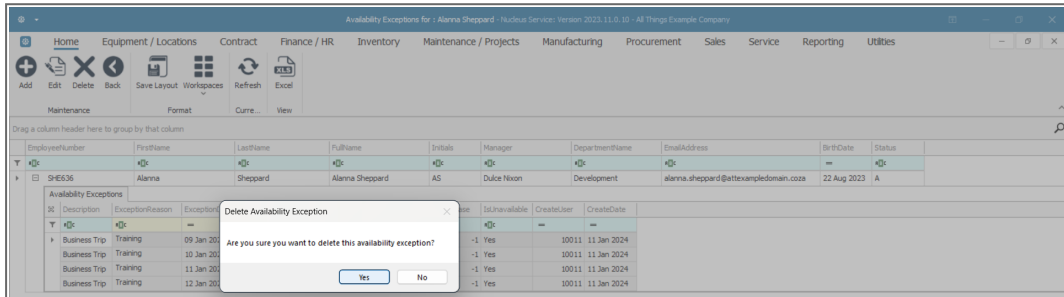


- Or **right-click** on the row you wish to delete.
- A **Process** menu will pop up.
- Click on **Delete Shift Exception**.

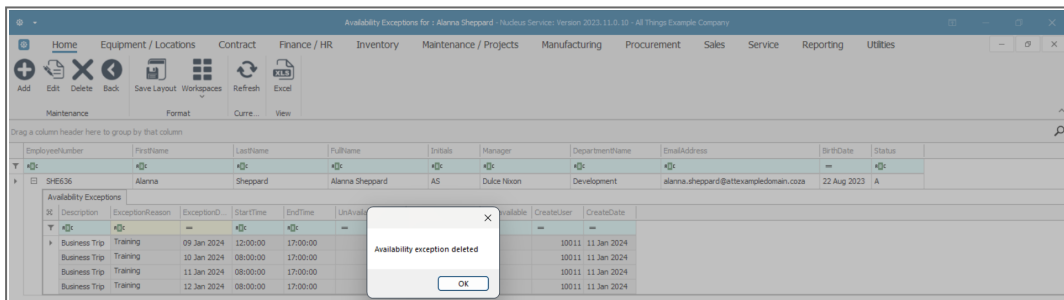


## SAVE EXCEPTION REMOVAL

- A **Delete Availability Exception** message will pop up asking -
  - **Are you sure you want to delete this availability exception?**
- Click on **Yes**.



- A message will pop up informing you -
  - **Availability exception deleted.**
- Click on **OK**.



## VIEW DELETION RESULTS

- You will return to the **Availability Exceptions for: [ ]** screen.
- The deleted exception has been **removed** from the Availability Exceptions sub grid.
- Click on **Back** to return to the **Employees** listing screen.

Availability Exceptions for : Alanna Sheppard -Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete Back Save Layout Workspaces Refresh Excel

Maintenance Format Curr... View

Drag a column header here to group by that column

EmployeeNumber	FirstName	LastName	FullName	Initials	Manager	DepartmentName	EmailAddress	BirthDate	Status
SHE636	Alanna	Sheppard	Alanna Sheppard	AS	Dulce Nixon	Development	alanna.sheppard@tstexampldomain.co.za	22 Aug 2023	A

Availability Exceptions	Description	ExceptionReason	ExceptionID	StartTime	EndTime	UnavailableTime	IncreaseDecrease	IsUnavailable	CreateUser	CreateDate
Business Trip	Training			10 Jan 2024 08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024
Business Trip	Training			11 Jan 2024 08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024
Business Trip	Training			12 Jan 2024 08:00:00	17:00:00	9.00	-1	Yes	10011	11 Jan 2024

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