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 <u>cannot</u> view the document.

Ribbon Access: Finance / HR Employees
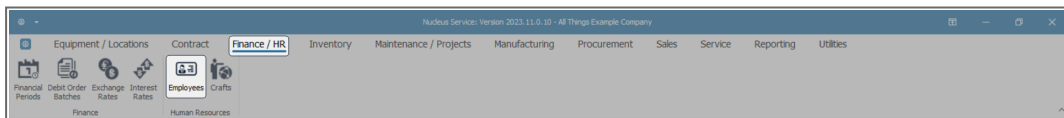
The **Employees** listing screen will display.

VIEW EMPLOYEE DOCUMENTS

SELECT EMPLOYEE

- Select the **row** of the employee whose list of digital documents you wish to view.

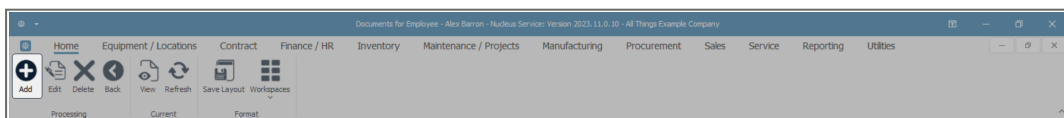- Click on the **Documents** tile in the **Links** panel.

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.

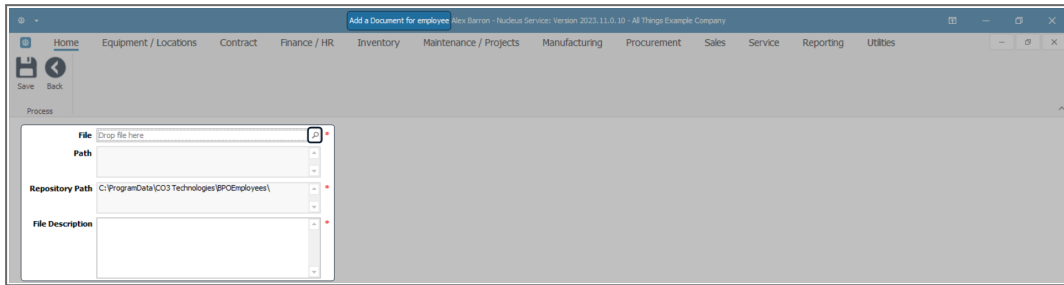- In this example, only **1** document is currently linked to the employee.

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**.
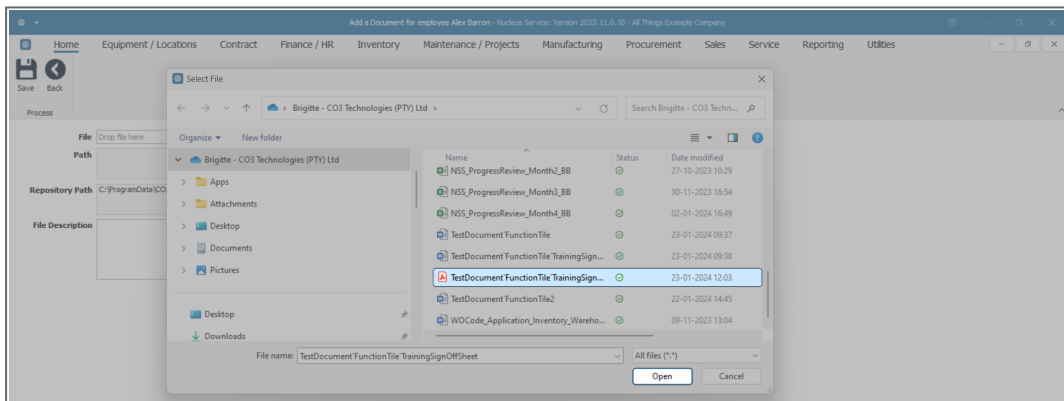
- The **File** and **Path** fields will now populate with the details of your selected document.
- **Repository Path** field is auto populated with what has been con-figured on your system.
- Type a **description** of the attached the document in the **File Description** field.
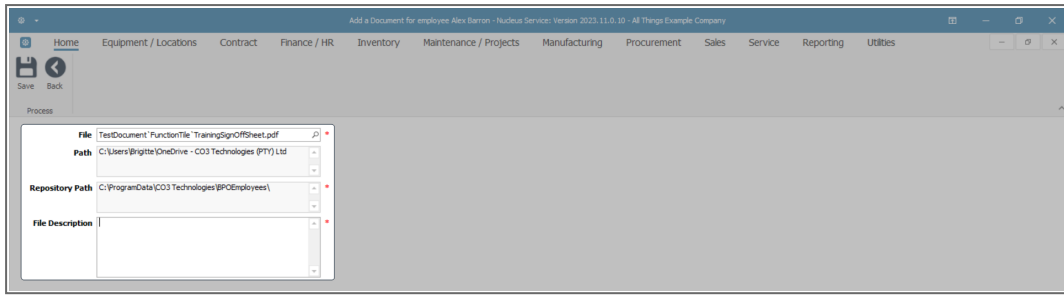
- When you have added the **File Description** -
- Click on **Save**.
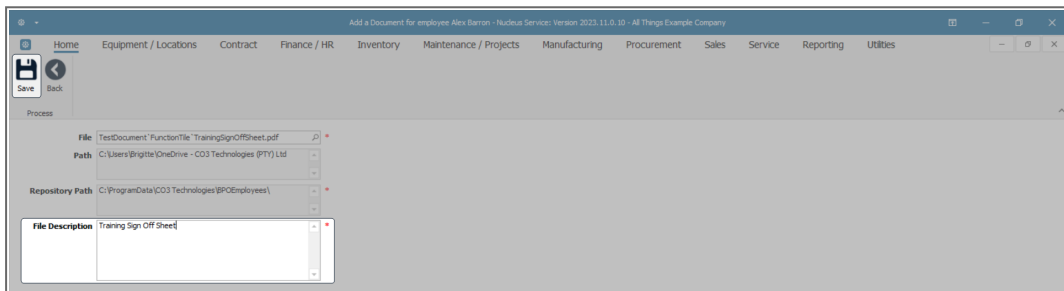
- You will return to the **Documents for Employee - [ ]** screen.

- A **Document Processing** message box will pop up, advising the following:

  - **The document: [ ] for employee [ ] has been saved.**
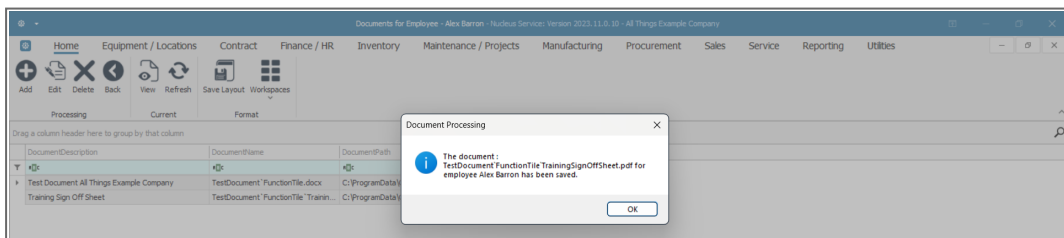
- Click on **OK**.

VIEW ADDED DOCUMENT

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

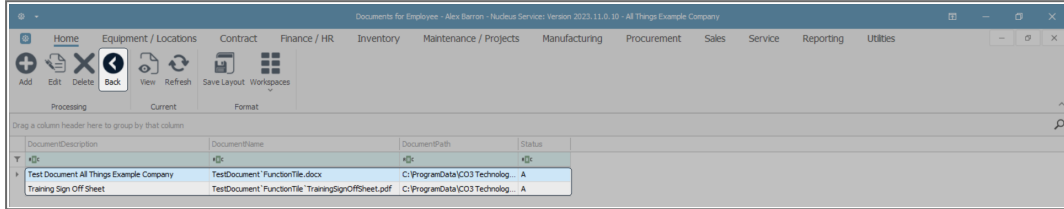

EDIT EMPLOYEE DOCUMENT

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.
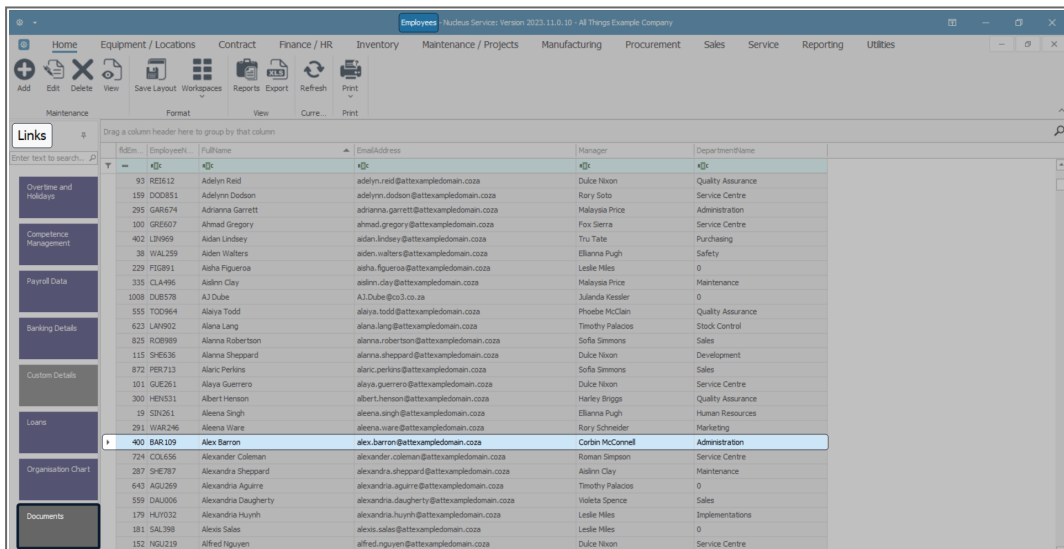
SELECT DOCUMENT

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

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

- Click on **Edit**.
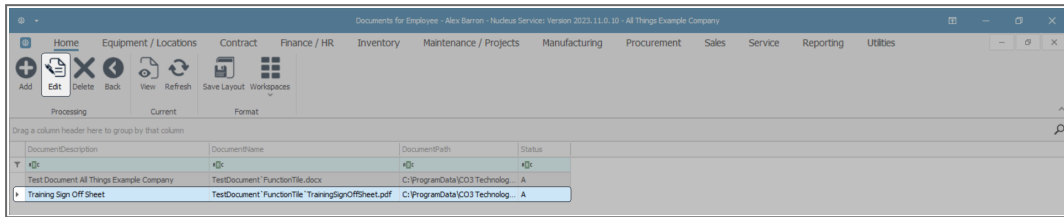
- A **Document** message box will pop up with the following prompt:

  - **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**.
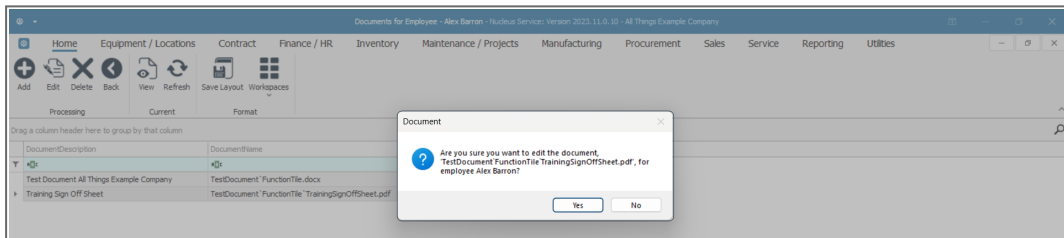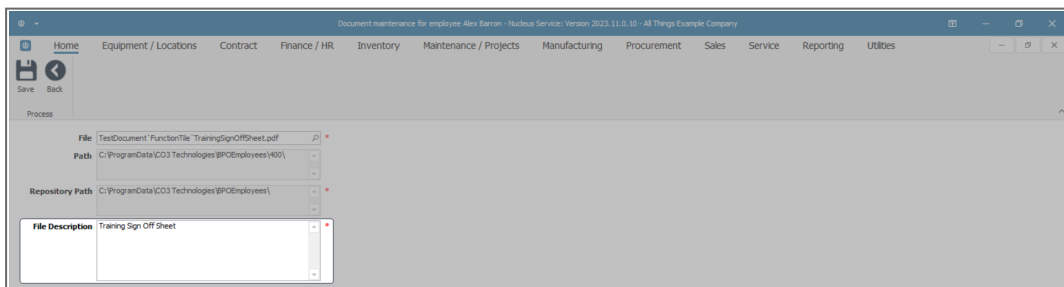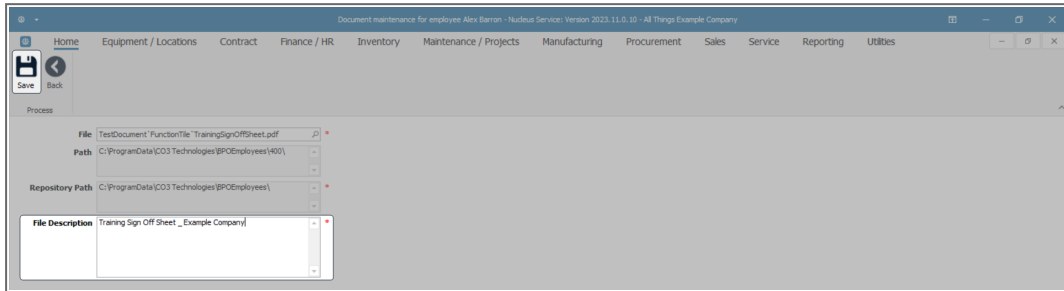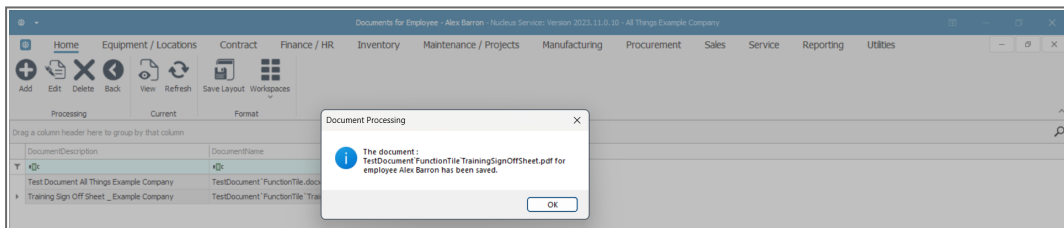

VIEW EDITED DOCUMENT

- 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.
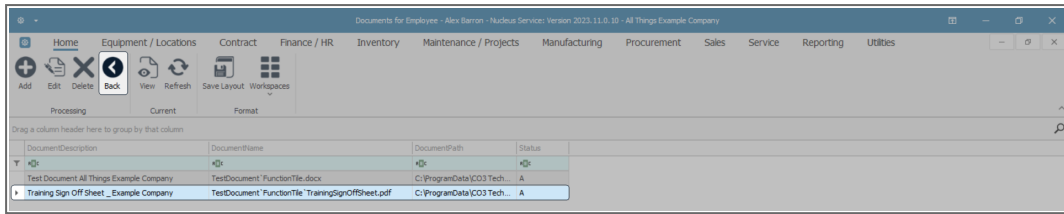
DELETE EMPLOYEE DOCUMENT
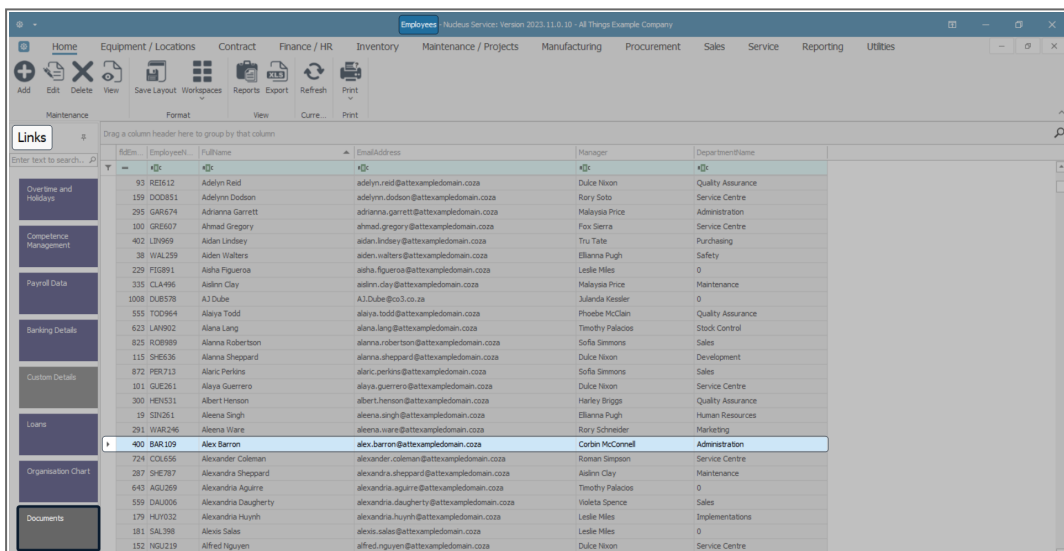
- In the **Employees** listing screen -

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.
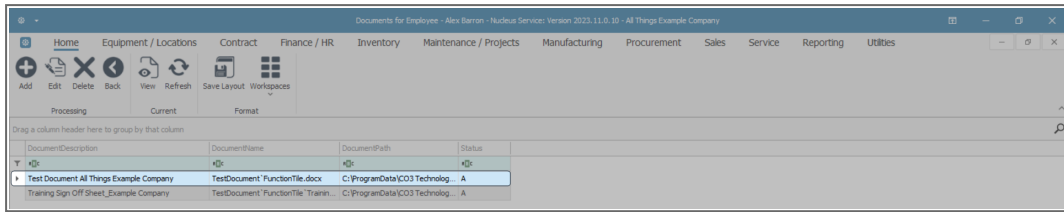

- The **Documents for Employee - [ ]** screen will open.
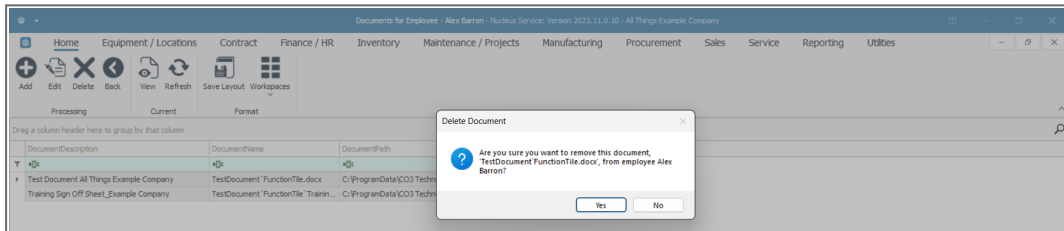
SELECT DOCUMENT

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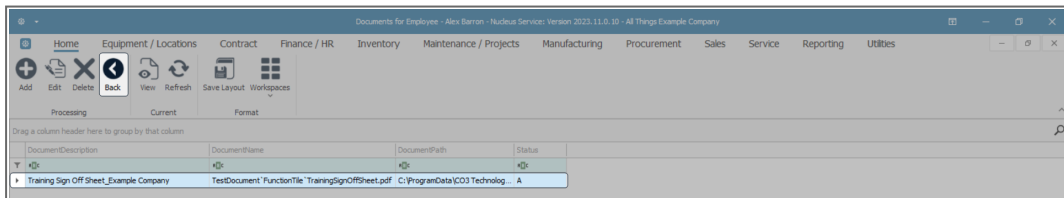
- Click on **Delete**.

- 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.

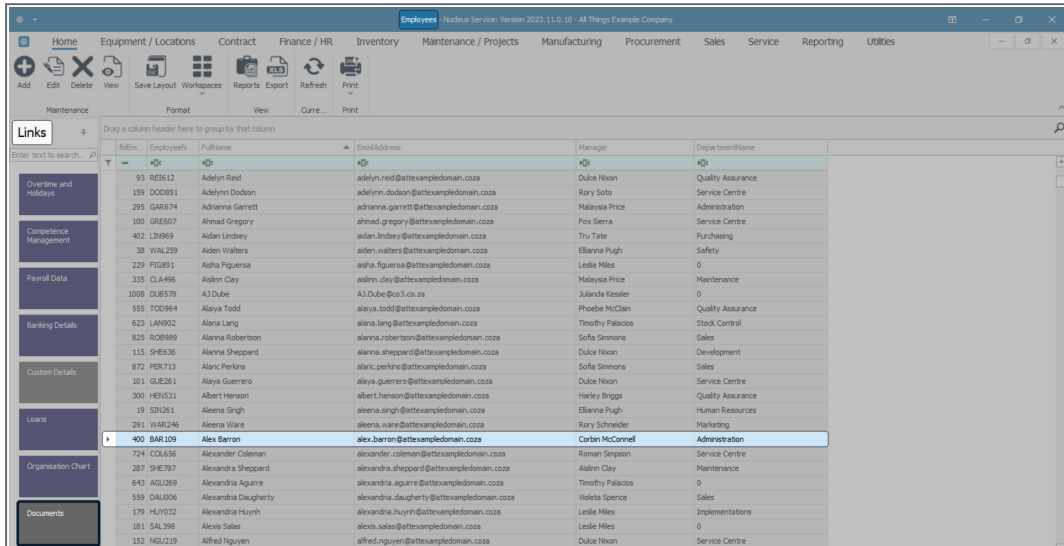- Click on **Back** to return to the **Employees** listing screen.

OPEN EMPLOYEE DOCUMENT

SELECT EMPLOYEE

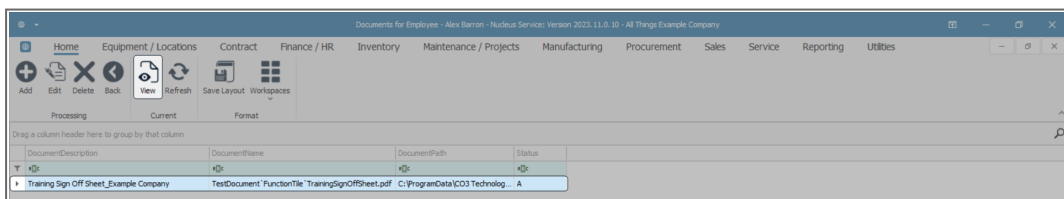- In the **Employees** listing screen -

- 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.
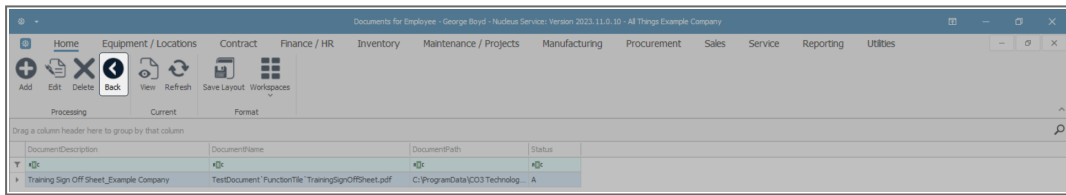
- Click on **View**.

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.

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