

# HUMAN RESOURCES

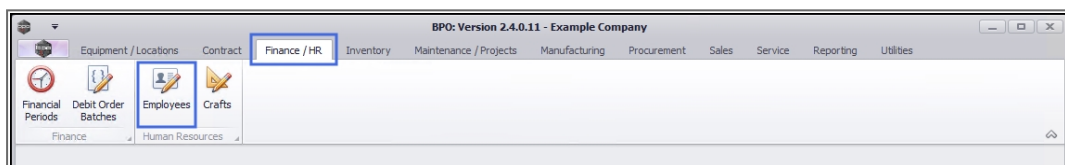
## EMPLOYEES – ADD DEPENDANT

In the **Edit Employee** screen, the **Dependants** docking panel lists all the **dependants** (child or adult) that are linked to the selected employee. You can Add, Edit and Delete a dependant in this panel.

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**Ribbon Access:** *Finance and HR > Employees*

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1. The **Employees** listing screen will display.

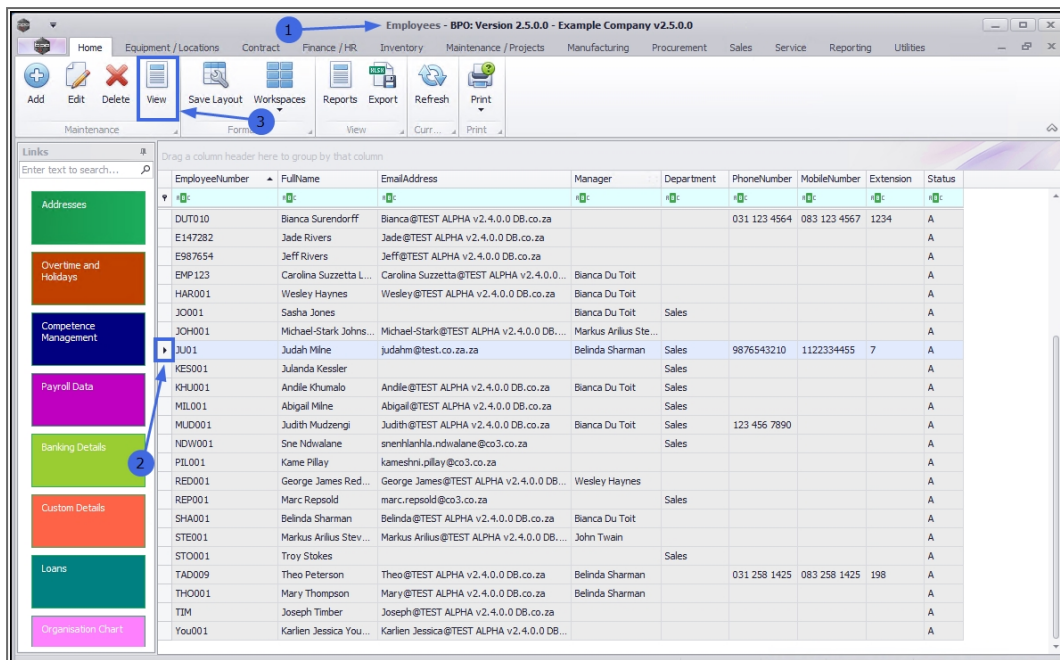
## VIEW DEPENDANTS

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### SELECT EMPLOYEE

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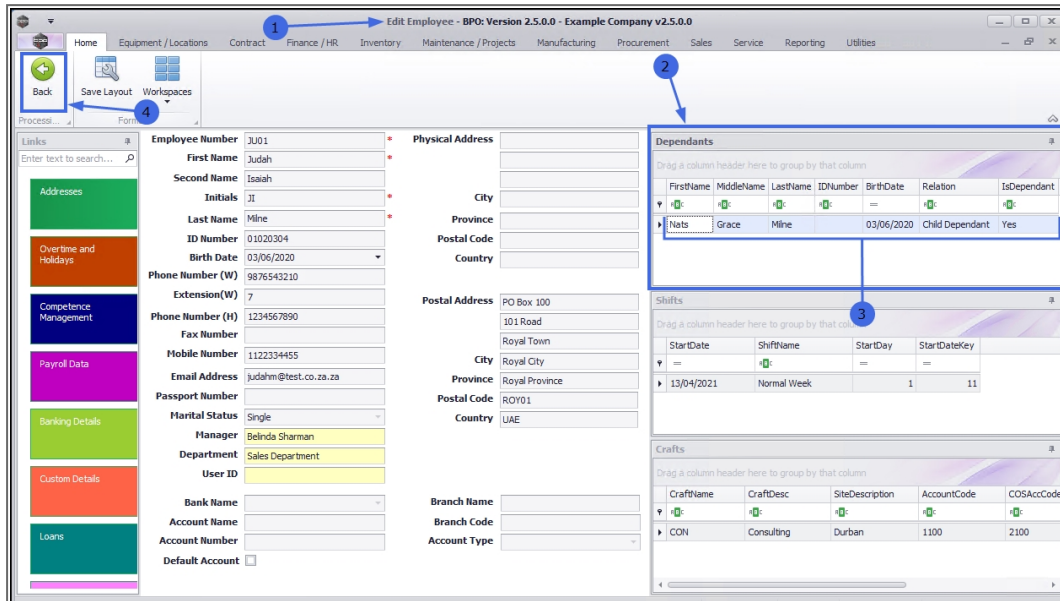
2. Select the **employee** for whom you wish to **view** the linked dependants.
3. Click on **View**.



## VIEW LINKED DEPENDANTS

- The **Edit Employee** screen will open.
  - Note:** Although this screen title is '**Edit Employee**', you cannot make or save changes here as it is a view only screen - there is no **Save** button.
- The **Dependants** frame is located in the top right of this screen.
- Here you can **view** the following details of any dependants currently linked to the selected employee:
  - First Name
  - Middle Name
  - Last Name
  - ID Number
  - Birth Date
  - Relation
  - Is Dependant (Yes or No)

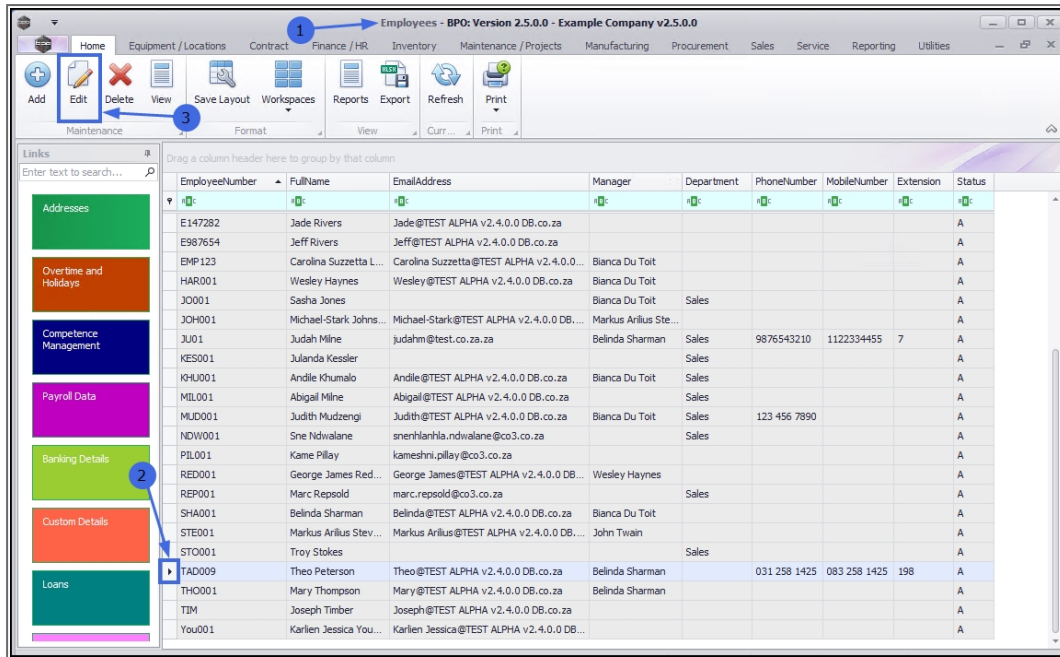
When you have finished viewing the Dependants details, click on **Back** to return to the **Employees** listing screen.



## ADD DEPENDANT

## SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **employee** to whom you wish to **add** a dependant.
3. Click on **Edit**.

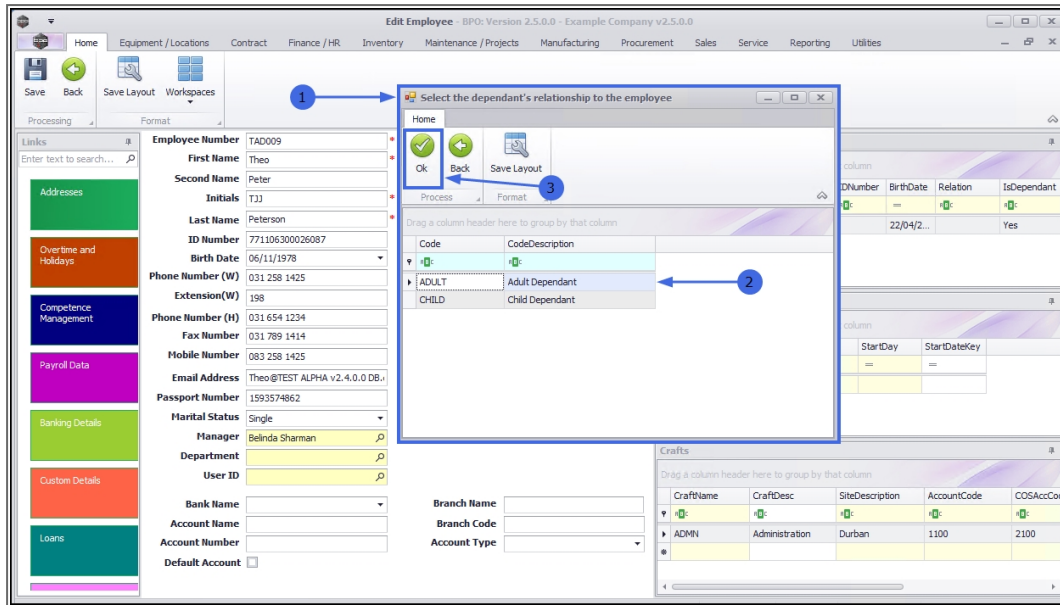


## ADD NEW DEPENDANT

1. The **Edit Employee** screen will open.
  - **Note:** You can add and edit details in this screen, there is an active **Save** button.
2. In the **Dependants** frame, right click in any row (except the filter row).
3. A **Process** menu will pop up.
4. Select **Dependant - Add new dependant** from the list.

## SELECT DEPENDANT'S RELATIONSHIP

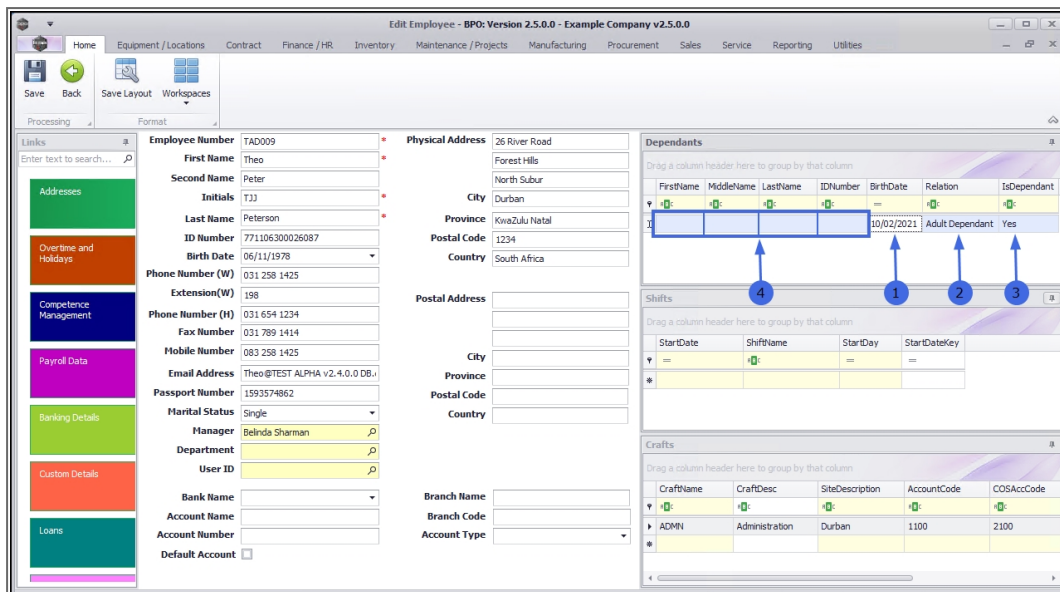
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## ADD NEW DEPENDANT DETAILS

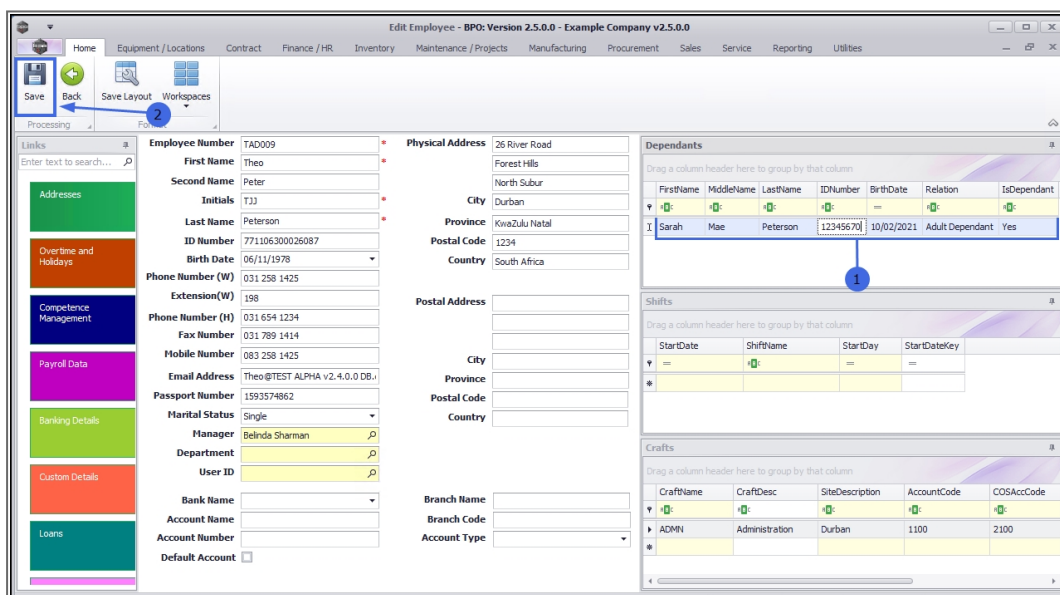
The **Select** screen will close and the following fields in the Dependants frame will auto populate:

1. **Birth Date:** This will populate with the current date. Click on the drop-down **arrow** and use the calendar function displayed, to select a different birth date, if applicable.
2. **Relation:** This will populate with the **relationship** selected in the pop up screen.
3. **Is Dependant:** This will populate with **Yes**.
4. The **4** remaining fields are free text fields, you can **type in** the required details:
  - **First Name**
  - **Middle Name**
  - **Last name**
  - **ID Number**



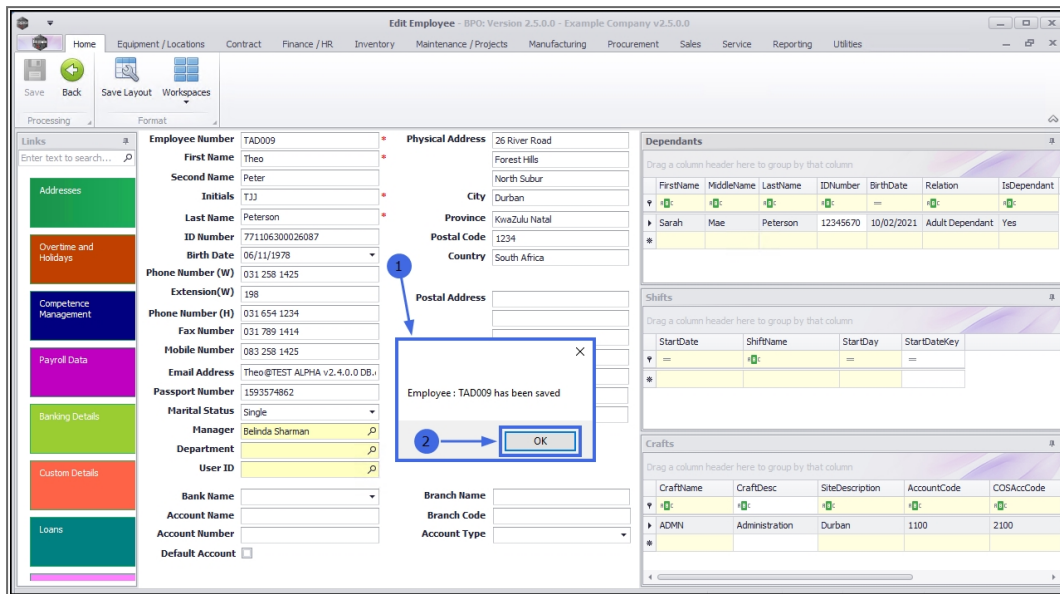
## SAVE NEW DEPENDANT

1. When you have finished adding the new dependant details,
2. Click on **Save**.



1. A message box will pop up informing you that;
  - **Employee: [ ] has been saved.**

## 2. Click on **OK**.



The screenshot shows the 'Edit Employee' window for employee TAD009. The form includes fields for personal details (First Name: Theo, Second Name: Peter, Initials: TJJ, Last Name: Peterson, ID Number: 771106300025087, Birth Date: 06/11/1978, Phone Number (W): 031 258 1425, Extension(W): 198, Phone Number (H): 031 654 1234, Fax Number: 031 789 1414, Mobile Number: 083 258 1425, Email Address: Theo@TEST ALPHA v2.4.0.0 DB, Passport Number: 1593574862, Marital Status: Single, Manager: Belinda Sharmen, Department, User ID, Bank Name, Account Name, Account Number, Default Account, Physical Address: 26 River Road, Forest Hills, North Subur, City: Durban, Province: KwaZulu Natal, Postal Code: 1234, Country: South Africa, and Branch Name, Branch Code, Account Type. A dependent list is shown on the right with columns: First Name, Middle Name, Last Name, ID Number, Birth Date, Relation, IsDependant. The list contains one entry: Sarah, Mae, Peterson, 12345670, 10/02/2021, Adult Dependant, Yes. A dialog box with the message 'Employee : TAD009 has been saved' and an 'OK' button is overlaid on the form. A blue arrow points from the 'OK' button in the dialog box to the 'OK' button in the form.

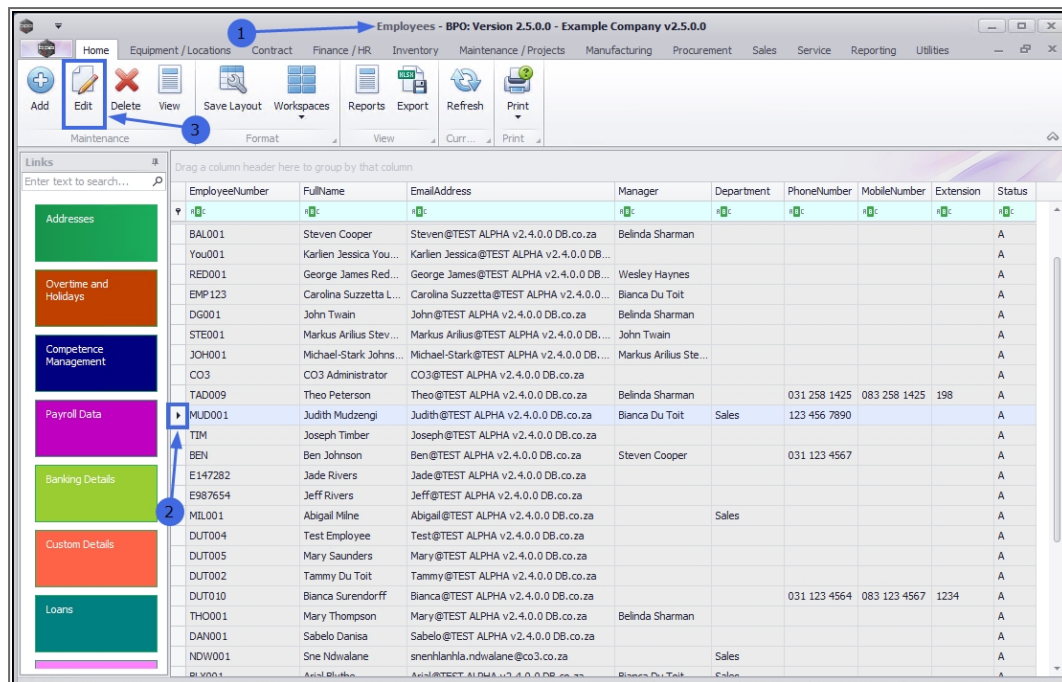
- The new dependant details will be saved and you will return to the **Employees** listing screen.

## EDIT DEPENDANT

### SELECT EMPLOYEE

- In the **Employees** listing screen,
- Select the **employee** whose dependant's details need to be **changed**.
- Click on **Edit**.





## EDIT DEPENDANTS DETAILS

1. The **Edit Employee** screen will open.
2. In the **Dependants** panel,
3. Click in the field where you wish to make the change.
  - Either type the new information in the field, or if necessary, **delete** the text that is there and type in the new information.

1. In this example, the **ID Number** has been changed.

## SAVE CHANGES

2. When you have finished editing the details, click on **Save**.
3. A message box will pop up informing you;
  - **Employee: [ ] has been saved.**
4. Click on **OK**.

2. When you have finished editing the details, click on **Save**.

3. A message box will pop up informing you;

- **Employee: [ ] has been saved.**

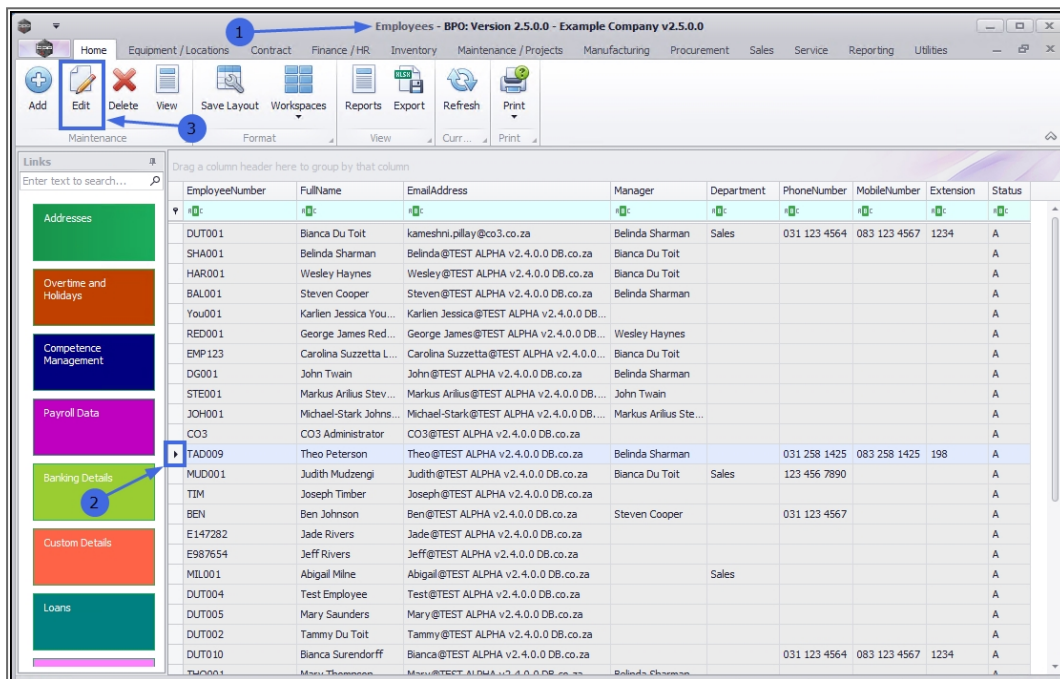
4. Click on **OK**.

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

## DELETE DEPENDANT

### SELECT EMPLOYEE

1. In the **Employees** listing screen,
2. Select the **employee** whose dependant's details need to be **deleted**.
3. Click on **Edit**.



### DELETE DEPENDANT DETAILS

1. The **Edit Employee** screen will open.
2. In the **Dependants** panel, **right click** in the **row** of the dependant you wish to delete.
3. A **Process** menu will pop up, click on **Delete** - Delete dependant in the list.

**Employee Number** TAD009

**Physical Address** 26 River Road, Forest Hills, North Subur, Durban, KwaZulu Natal, 1234, South Africa

First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependant
Sarah	Mae	Peterson	12345670	10/02/2021	Adult Dependant	Yes

**Dependents** table actions: Add new dependant, Delete dependant

## CONFIRM DELETION

1. A **Delete Dependant** message box will pop up asking;
  - **Are you sure you want to delete this dependant [ ]?**
2. Click on **Yes**.

**Delete Dependant**

Are you sure you want to delete this dependant Sarah?

**Yes** **No**

1. The selected dependant's details will be **removed** from the panel.
2. Click on **Back** to return to the **Employees** listing screen.

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

Save Back Save Layout Workspaces

Processing Form

Links  
Enter text to search...

Addresses  
Overtime and Holidays  
Competence Management  
Payroll Data  
Banking Details  
Custom Details  
Loans

Employee Number TAD009  
First Name Theo  
Second Name Peter  
Initials TJJ  
Last Name Peterson  
ID Number 771106300026087  
Birth Date 06/11/1978  
Phone Number (W) 031 258 1425  
Extension(W) 198  
Phone Number (H) 031 654 1234  
Fax Number 031 789 1414  
Mobile Number 083 258 1425  
Email Address Theo@TEST.ALPHA v2.4.0.0 DB  
Passport Number 1593574862  
Marital Status Single  
Manager Belinda Sharman  
Department  
User ID  
Bank Name  
Account Name  
Account Number  
Default Account

Physical Address 26 River Road  
Forest Hills  
North Subur  
City Durban  
Province KwaZulu Natal  
Postal Code 1234  
Country South Africa  
Postal Address  
City  
Province  
Postal Code  
Country  
Branch Name  
Branch Code  
Account Type

Dependents  
Drag a column header here to group by that column  

First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependend

Shifts  
Drag a column header here to group by that column  

Start Date	Shift Name	Start Day	Start Date Key

Crafts  
Drag a column header here to group by that column  

Craft Name	Craft Desc	Site Description	Account Code	COS Acc Code	Cost Estimate	Rate	Id
ADMIN	Administration	Durban	1100	2100	0.00	0.00	Ye

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