

# HUMAN RESOURCES

## EMPLOYEES – ADD DEPENDANT

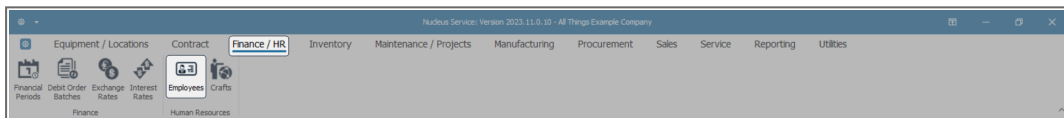
In the **Edit Employee** screen, the **Dependants** docking panel lists all the **dependants**, (child or adult), that are linked to the selected employee.

You can add, edit and delete a dependant in this panel.

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### Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will display.

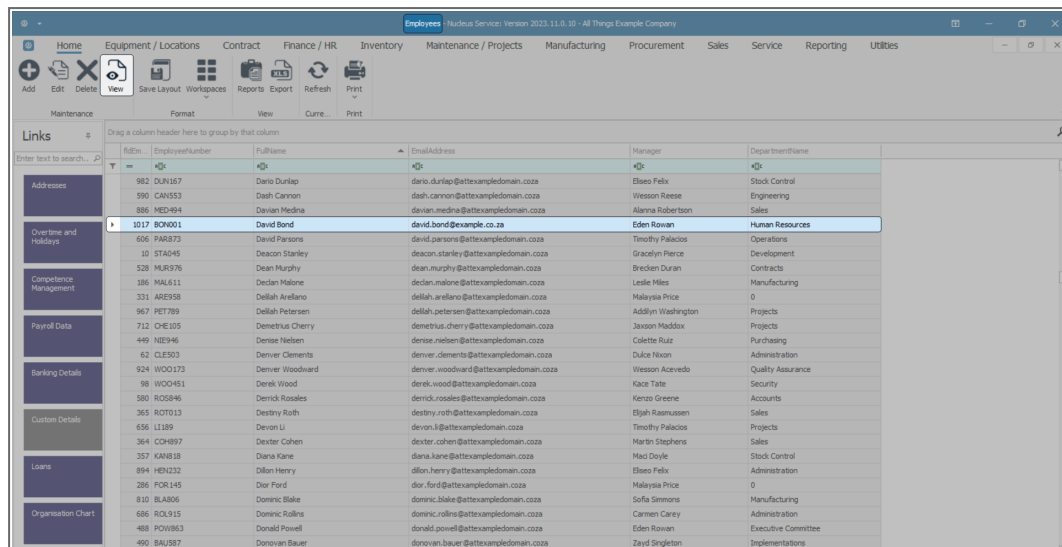
## VIEW DEPENDANTS

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### SELECT EMPLOYEE

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- Select the row of the **employee** for whom you wish to **view** the linked dependants.
- Click on **View**.

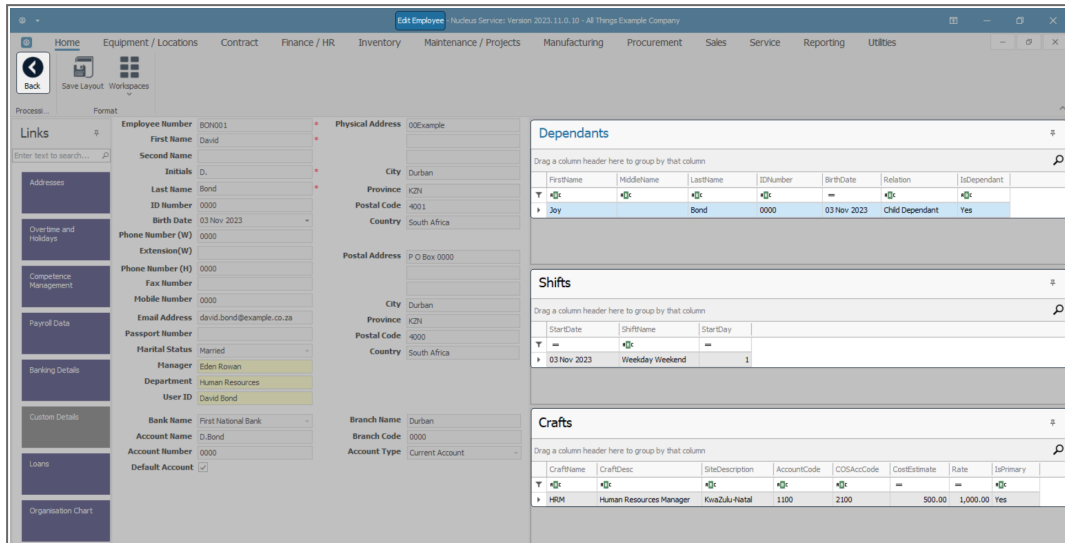


ID	Employee Number	Full Name	Email Address	Manager	Department Name
982	DUN167	Dario Dunlap	dario.dunlap@attexampdomain.co.za	Elsao Felix	Stock Control
590	CAN553	Dash Cannon	dash.cannon@attexampdomain.co.za	Wesson Reese	Engineering
886	MED494	Devian Medina	devian.medina@attexampdomain.co.za	Alenna Robertson	Sales
1017	BON001	David Bond	david.bond@attexampdomain.co.za	Eden Rowan	Human Resources
606	FAR873	David Parsons	david.parsons@attexampdomain.co.za	Timothy Palacios	Operations
10	STAR445	Dawson Stanley	dawson.stanley@attexampdomain.co.za	Grady Prence	Development
528	MUR976	Dean Murphy	dean.murphy@attexampdomain.co.za	Brecken Duran	Contracts
186	MAL611	Declan Malone	declan.malone@attexampdomain.co.za	Leslie Miles	Manufacturing
331	ARE958	Deliah Arellano	deliah.arellano@attexampdomain.co.za	Malaysia Price	0
967	PET789	Deliah Petersen	deliah.petersen@attexampdomain.co.za	Addilyn Washington	Projects
712	CHE105	Demetrius Cherry	demetrius.cherry@attexampdomain.co.za	Javson Maddox	Projects
449	NIE946	Dennis Nielsen	dennis.nielsen@attexampdomain.co.za	Colette Ruiz	Purchasing
62	CLE503	Denver Clements	denver.clements@attexampdomain.co.za	Dulce Nixon	Administration
924	WOO173	Denver Woodward	denver.woodward@attexampdomain.co.za	Wesson Acevedo	Quality Assurance
98	WOO451	Derek Wood	derek.wood@attexampdomain.co.za	Kace Tate	Security
580	ROS946	Derrick Rosales	derrick.rosales@attexampdomain.co.za	Kenzo Greene	Accounts
365	ROT013	Destiny Roth	destiny.roth@attexampdomain.co.za	Elijah Kasumam	Sales
456	L1189	Devon Li	devon.li@attexampdomain.co.za	Timothy Palacios	Projects
364	COA897	Dexter Cohen	dexter.cohen@attexampdomain.co.za	Martin Stephens	Sales
357	KAN018	Diana Kane	diana.kane@attexampdomain.co.za	Mac Doyle	Stock Control
894	HEN232	Dillon Henry	dillon.henry@attexampdomain.co.za	Elsao Felix	Administration
286	FOR145	Dior Ford	dior.ford@attexampdomain.co.za	Malaysia Price	0
810	BLA806	Dominic Blake	dominic.blake@attexampdomain.co.za	Sofia Simmons	Manufacturing
686	ROL915	Dominic Rollins	dominic.rollins@attexampdomain.co.za	Carmen Carey	Administration
488	POW063	Donald Powell	donald.powell@attexampdomain.co.za	Eden Rowan	Executive Committee
490	BAU587	Donovan Bauer	donovan.bauer@attexampdomain.co.za	Zayd Singleton	Implementations

## VIEW LINKED DEPENDANTS

- The **Edit Employee** screen will open.
  - **Note:** Although this screen title is named 'Edit Employee', this is a view only screen - you will notice that there is only a **Back** button, therefore you cannot make or save changes in this screen.
- 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.



Firstname	Middlename	Lastname	IDNumber	BirthDate	Relation	IsDependant
Joy		Bond	0000	03 Nov 2023	Child Dependent	Yes

## ADD DEPENDANT

## SELECT EMPLOYEE

- In the **Employees** listing screen -
- Select the **employee** to whom you wish to **add** a dependant.
- Click on **Edit**.

Employees					
Nucleus Services: Version 2023.11.0.10 - All Things Example Company					
Home	Equipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects
Manufacturing	Procurement	Sales	Service	Reporting	Utilities
Links	Drag a column header here to group by that column				
Enter text to search...	Fullname	EmployeeNumber	EmailAddress	Manager	DepartmentName
Addresses	1017 BON001	David Bond	david.bond@example.co.za	Eden Rowan	Human Resources
Overtime and Holidays	606 FAR873	David Parsons	david.parsons@example.com	Timothy Palacios	Operations
Competence Management	10 STAR445	Dawson Stanley	dawson.stanley@example.com	Grady Preece	Development
Payroll Data	528 MAL976	Dean Murphy	dean.murphy@example.com	Brecken Duran	Contracts
Banking Details	186 MAL611	Declan Malone	declan.malone@example.com	Leslie Miles	Manufacturing
Custom Details	331 ARE958	Dellah Arellano	dellah.arellano@example.com	Malaysia Price	0
Loans	967 PET789	Dellah Petersen	dellah.petersen@example.com	Addilyn Washington	Projects
Organisation Chart	712 CHE105	Demetrius Cherry	demetrius.cherry@example.com	Jaxson Maddox	Projects
	449 NDE946	Dennis Nielsen	dennis.nielsen@example.com	Colette Ruiz	Purchasing
	62 CLE503	Denver Clements	denver.clements@example.com	Dulce Nixon	Administration
	924 WOO173	Denver Woodward	denver.woodward@example.com	Wesson Acervo	Quality Assurance
	98 WOO451	Derek Wood	derek.wood@example.com	Kace Tate	Security
	580 ROS946	Derrick Rosales	derrick.rosales@example.com	Karen Greene	Accounts
	365 ROT013	Destiny Roth	destiny.roth@example.com	Elijah Karaman	Sales
	456 L1189	Devon Li	devon.li@example.com	Timothy Palacios	Projects
	364 COA897	Dexter Cohen	dexter.cohen@example.com	Martin Stephens	Sales
	357 KAN818	Diana Kane	diana.kane@example.com	Mac Doyle	Stock Control
	894 HEN232	Dillon Henry	dillon.henry@example.com	Elsao Doyle	Administration
	286 FOR145	Dior Ford	dior.ford@example.com	Malaysia Price	0
	810 BLA806	Dominic Blake	dominic.blake@example.com	Sofia Simmons	Manufacturing
	686 ROL915	Dominic Rollins	dominic.rollins@example.com	Carmen Carey	Administration
	488 POW853	Donald Powell	donald.powell@example.com	Eden Rowan	Executive Committee
	490 SAU587	Donovan Bauer	donovan.bauer@example.com	Zayd Singleton	Implementations

## ADD NEW DEPENDANT

- The **Edit Employee** screen will open.
  - Note:** You can add and edit details in this screen, there is an active **Save** button.
- In the **Dependants** frame, **right click** on any field in the last blank row.
- A **Process** menu will pop up.
- Select **Dependant - Add new dependant** from the list.

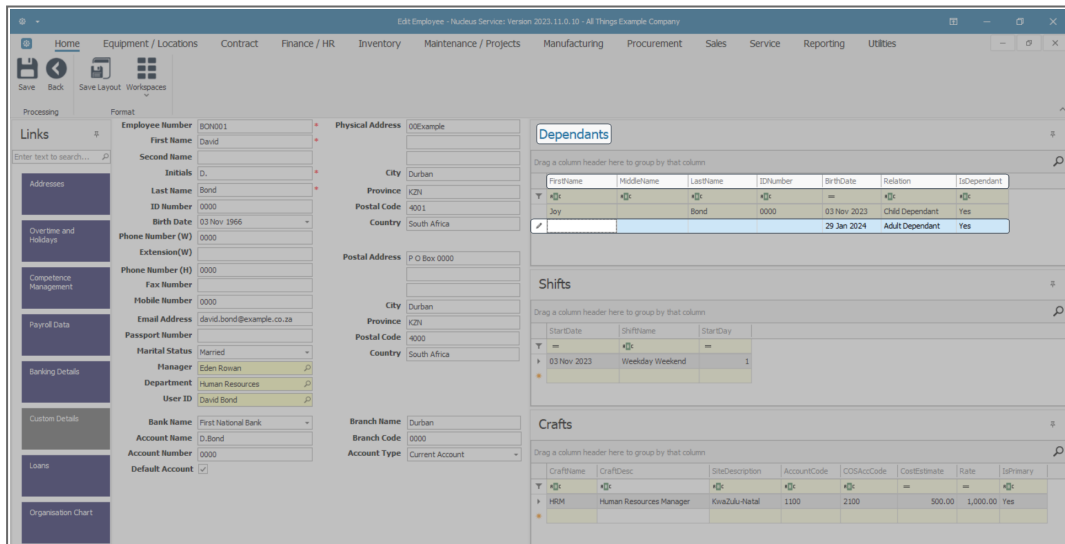
First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependent
Joy		Bond	0000	03 Nov 2023	Child Dependent	Yes

## SELECT DEPENDANT'S RELATIONSHIP

- A **Select the dependant's relationship to the employee** screen will pop up.
- Select the **row** of the type of dependant that applies.
- In this example, an **Adult Dependant** (the wife of the employee) is selected.
- Click on **Ok**.

## ADD NEW DEPENDANT DETAILS

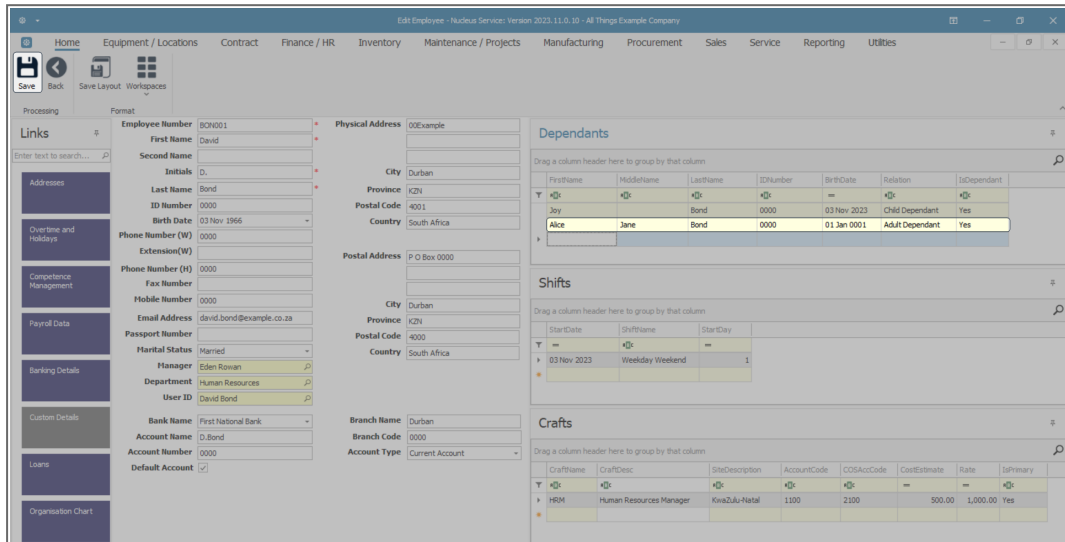
- The **Select** screen will close and the following fields in the Dependants frame will auto populate:
  - Birth Date:** This will populate with the current date. Click on the drop-down **arrow** and use the calendar function displayed, to select a different birth date, if applicable.
  - Relation:**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



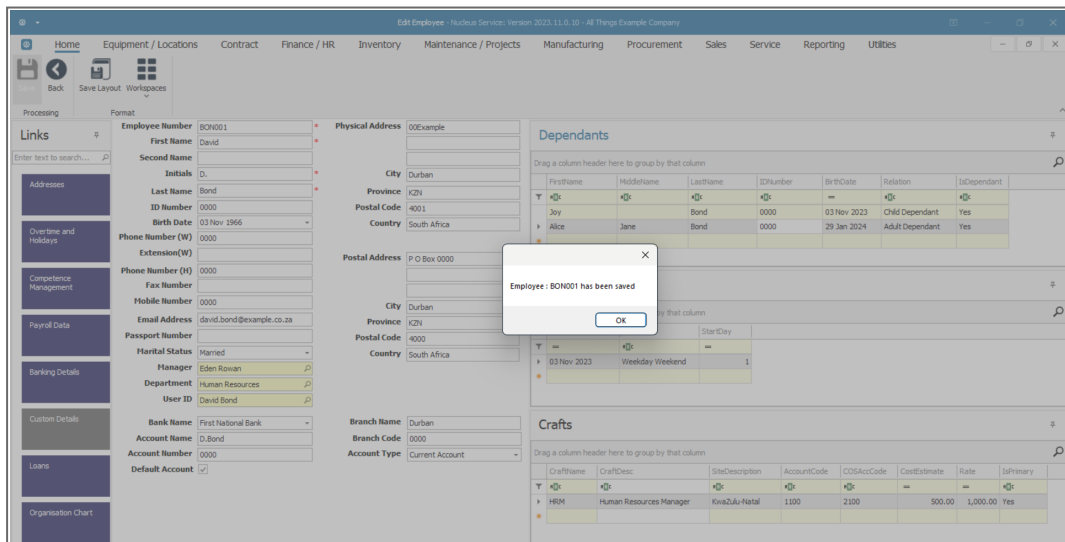
First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependant
Joy		Bond	0000	03 Nov 2023	Child Dependent	Yes

## SAVE NEW DEPENDANT

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



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

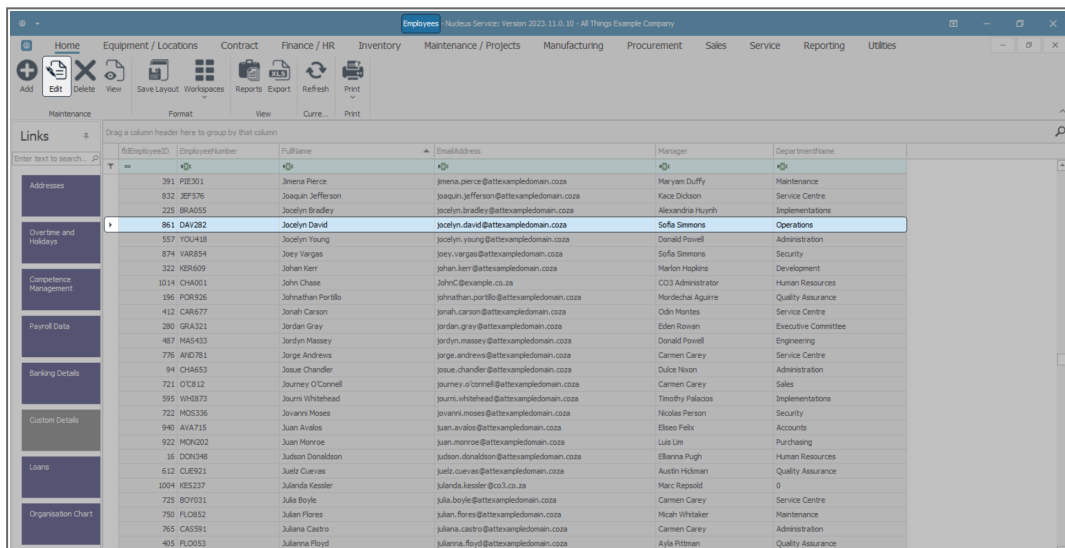


- The new dependant details will be saved and you will return to the **Employees** listing screen.

## EDIT DEPENDANT

### SELECT EMPLOYEE

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



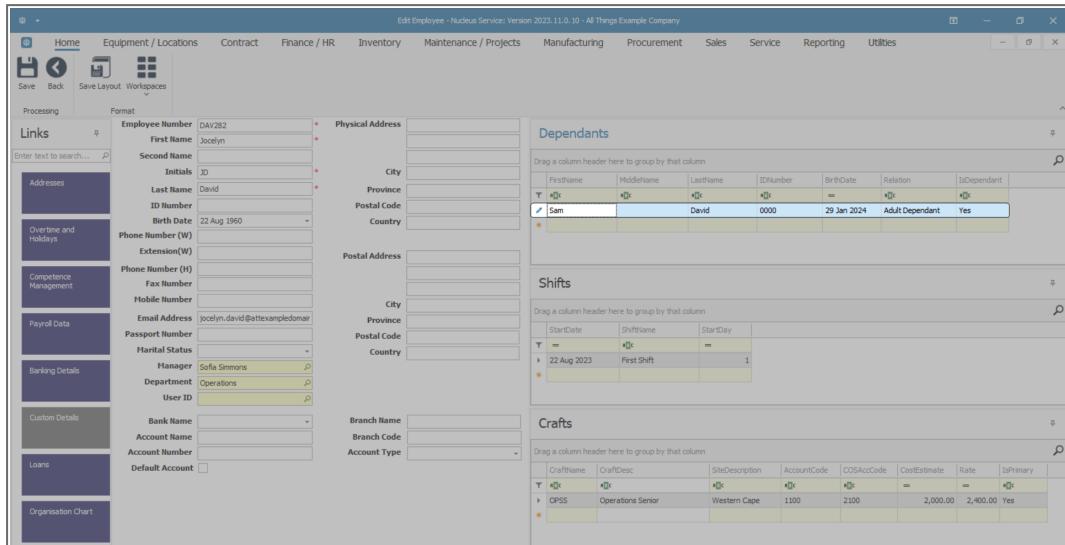
FullEmployeeID	EmployeeNumber	FullName	EmailAddress	Manager	DepartmentName
391	PIE301	Josena Pierce	josena.pierce@tattexampdomain.co.za	Maryam Duffy	Maintenance
832	JEFS76	Josquin Jefferson	josquin.jefferson@tattexampdomain.co.za	Kace Dickson	Service Centre
225	BRA055	Jocelyn Bradley	jocelyn.bradley@tattexampdomain.co.za	Alexandria Hujrh	Implementations
861	DAV282	Jocelyn David	jocelyn.david@tattexampdomain.co.za	Sofa Simons	Operations
557	YOU418	Jocelyn Young	jocelyn.young@tattexampdomain.co.za	Donald Powell	Administration
874	VAB854	Joey Vargas	joey.vargas@tattexampdomain.co.za	Sofa Simons	Security
322	KER609	Johan Kerr	johan.kerr@tattexampdomain.co.za	Marlon Hopkins	Development
1014	CHA001	John Chase	johnc@tattexampdomain.co.za	CO3 Administrator	Human Resources
196	PCR505	Johnathan Portillo	johnathan.portillo@tattexampdomain.co.za	Mordchai Aguirre	Quality Assurance
412	CAR577	Jonah Carson	jonah.carson@tattexampdomain.co.za	Obi Montes	Service Centre
280	GRA321	Jordan Gray	jordan.gray@tattexampdomain.co.za	Eden Roman	Executive Committee
487	MA5433	Jordyn Massey	jordyn.massey@tattexampdomain.co.za	Donald Powell	Engineering
776	AND781	Jorge Andrews	jorge.andrews@tattexampdomain.co.za	Carmen Carey	Service Centre
94	CHA653	Josue Chandler	josue.chandler@tattexampdomain.co.za	Dulce Nixon	Administration
721	OC812	Journey O'Connell	journey.o'connell@tattexampdomain.co.za	Carmen Carey	Sales
595	WH873	Journ Whitehead	journ.whitehead@tattexampdomain.co.za	Timothy Palacios	Implementations
722	MOS336	Jovanni Moses	jovanni.moses@tattexampdomain.co.za	Nicolas Person	Security
940	AVA715	Juan Avalos	juan.avalos@tattexampdomain.co.za	Eliseo Felix	Accounts
922	MON002	Juan Monroe	juan.monroe@tattexampdomain.co.za	Luis Lim	Purchasing
16	DON048	Judson Donaldson	judson.donaldson@tattexampdomain.co.za	Ellanna Pugh	Human Resources
612	CUE021	Julia Curves	julie.curves@tattexampdomain.co.za	Austin Nelson	Quality Assurance
1004	KES237	Julanda Kessler	julanda.kessler@tattexampdomain.co.za	Marc Repsold	0
725	BOY031	Julia Boyle	julia.boyle@tattexampdomain.co.za	Carmen Carey	Service Centre
790	FLO852	Julian Flores	julian.flores@tattexampdomain.co.za	Micah Whitaker	Maintenance
765	CAS591	Juliana Castro	juliana.castro@tattexampdomain.co.za	Carmen Carey	Administration
405	FLO053	Julanna Floyd	julanna.floyd@tattexampdomain.co.za	Ayla Pittman	Quality Assurance

### EDIT DEPENDANTS DETAILS

- The **Edit Employee** screen will open.
- In the **Dependants** panel -
- 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.



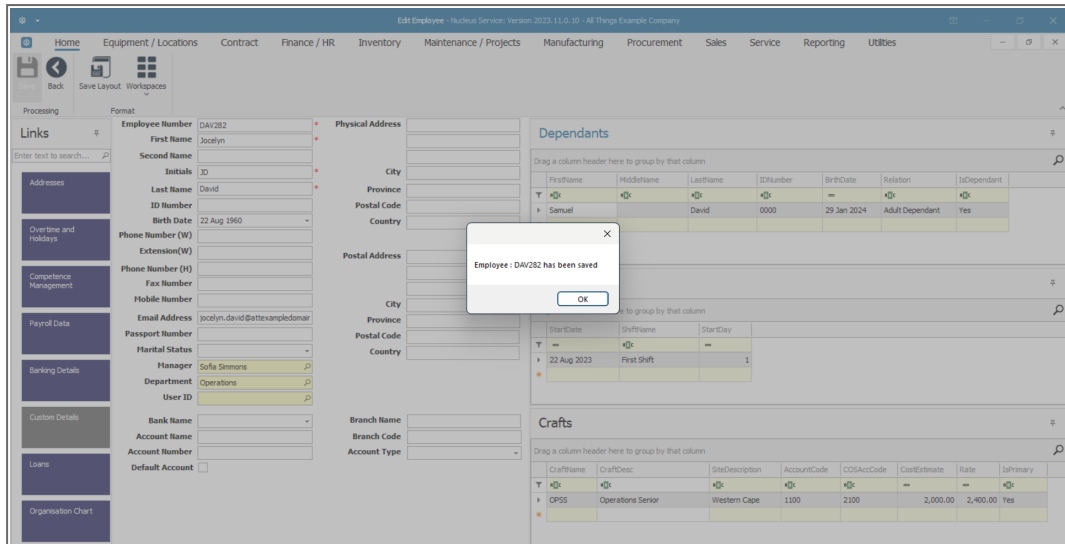
The screenshot shows the 'Edit Employee' form in the CO3 Technologies system. The 'Dependents' section is highlighted, showing a table with columns: First Name, Middle Name, Last Name, ID Number, Birth Date, Relation, and Is Dependent. The table contains one entry: Sam David, ID 0000, born 29 Jan 2024, Adult Dependant, Yes.

First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependent
Sam	David		0000	29 Jan 2024	Adult Dependant	Yes

- In this example, the **FirstName** will be edited.

## SAVE CHANGES

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



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

## DELETE DEPENDANT

### SELECT EMPLOYEE

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

## DELETE DEPENDANT DETAILS

- Home

Equipment / Locations

Contract

Finance / HR

Inventory

Maintenance / Projects

Manufacturing

Procurement

Sales

Service

Reporting

Utilities

Save

Back

Save Layout

Workspaces

Processing

Format

Links

Enter text to search...

Address

Over time and holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Organisation Chart

Employee Number

First Name

Second Name

Initials

Last Name

ID Number

Birth Date

Phone Number (W)

Extension (W)

Phone Number (H)

Facx Number

Mobile Number

Email Address

Passport Number

Marital Status

Manager

Department

User ID

Bank Name

Account Name

Account Number

Default Account

Physical Address

City

Province

Postal Code

Country

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 Dependent
T		Chase	0000	29 Jan 2024	Adult Dependent	Yes

Process

Dependent

Add new dependent

Delete

Delete dependent

Shiffs

Drag a column header here to group by that column

Star Date	Shift Name	Star Day
T		
22 Aug 2023	First Shift	1

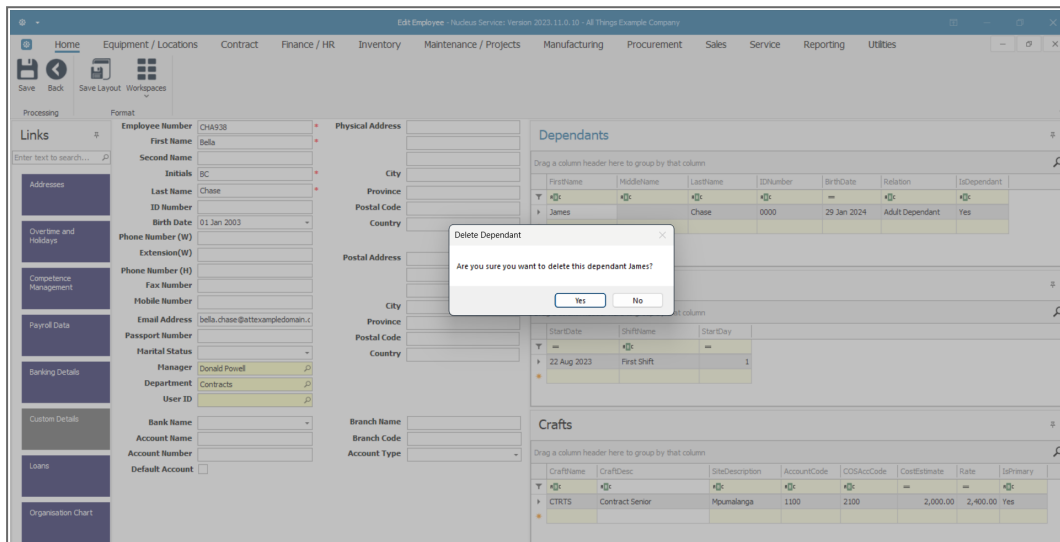
Crafts

Drag a column header here to group by that column

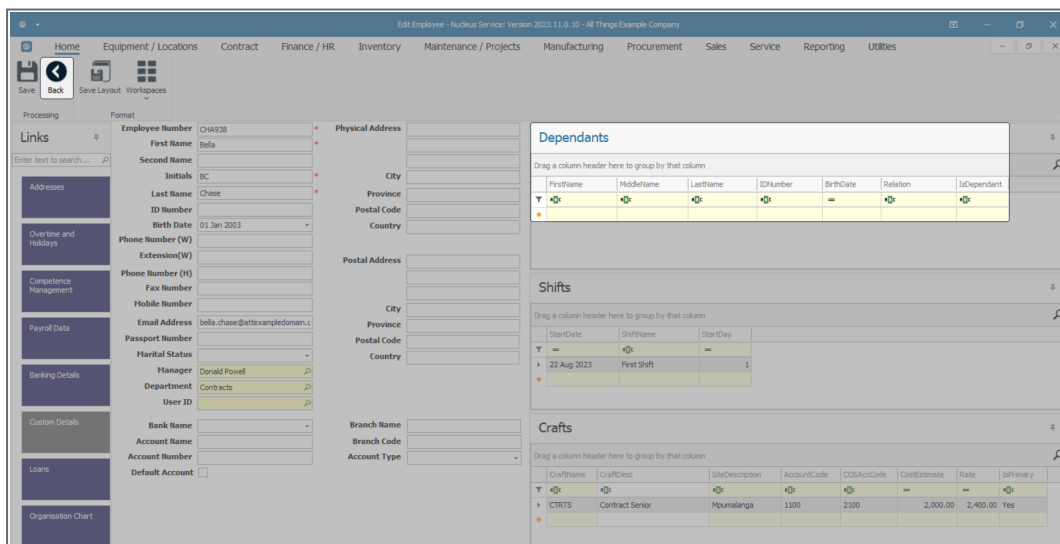
Craft Name	Craft Desc	Site Description	Account Code	COS Acc Code	Cost Estimate	Rate	Suppmary
T							
CTRTS	Contract Sensor	Mpumalanga	1100	2100	2,000.00	2,400.00	Yes

## CONFIRM DELETION

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



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





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