

# **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 <u>Add</u>, <u>Edit</u> and <u>Delete</u> a dependant in this panel.

*Ribbon Access: Finance and HR > Employees* 

<b>•</b> =						BPO: Version 2.4.0.	11 - Example Con	npany					_ • ×
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1. The *Employees* listing screen will display.

# **VIEW DEPENDANTS**

#### SELECT EMPLOYEE

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



## **Employee Dependants**

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		E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A		
Overtime and		E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A		
Holidays		EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					A		
		HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A		
		JO001	Sasha Jones		Bianca Du Toit	Sales				A		
Competence Management		JOH001	Michael-Stark Johns	Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					A		
	Þ	JU01	Judah Milne	judahm@test.co.za.za	Belinda Sharman	Sales	9876543210	1122334455	7	A		
		KES001	Julanda Kessler			Sales				A		
Payroll Data	Γ	KHU001	Andile Khumalo	Andie@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A		
		MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A		
		MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			Α		
Banking Details		NDW001	Sne Ndwalane	snenhlanhla.ndwalane@co3.co.za		Sales				A		
2		PIL001	Kame Pillay	kameshni.pillay@co3.co.za						A		
		RED001	George James Red	George James@TEST ALPHA v2.4.0.0 DB	Wesley Haynes					A		
Custom Details		REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A		
		SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A		
		STE001	Markus Arilius Stev	Markus Arilius@TEST ALPHA v2.4.0.0 DB	John Twain					A		
Loans		STO001	Troy Stokes			Sales				A		
courts		TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	A		
		THO001	Mary Thompson	Mary@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A		
		TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A		
		You001	Karlien Jessica You	Karlien Jessica@TEST ALPHA v2.4.0.0 DB						A		

#### **VIEW LINKED DEPENDANTS**

- 1. 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 <u>view only</u> screen there is no *Save* button.
- 2. The *Dependants* frame is located in the top right of this screen.
- 3. 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.

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# **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*.



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	KHU001	Andile Khumalo	Andile@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales				A	
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	MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
	NDW001	Sne Ndwalane	snenhlanhla.ndwalane@co3.co.za		Sales				A	
Banking Details	PIL001	Kame Pillay	kameshni.pillay@co3.co.za						A	
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	REP001	Marc Repsold	marc.repsold@co3.co.za		Sales				A	
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	TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						A	
	You001	Karlien Jessica You	Karlien Jessica@TEST ALPHA v2.4.0.0 DB						A	

## 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.



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# **SELECT DEPENDANT'S RELATIONSHIP**

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



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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 dropdown *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



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#### SAVE NEW DEPENDANT

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

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



2. Click on OK.

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Holidays	Birth Date		Country	South Africa							
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• The new dependant details will be saved and you will return to the *Employees* listing screen.

# **EDIT DEPENDANT**

#### SELECT EMPLOYEE

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



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Addresses		BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
		You001	Karlien Jessica You	-						A	
		RED001	George James Red	George James@TEST ALPHA v2.4.0.0 DB.	Wesley Haynes					A	
Overtime and Holidays		EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0.	. Bianca Du Toit					A	
		DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A	
		STE001	Markus Arilius Stev	Markus Arilius@TEST ALPHA v2.4.0.0 DB.	John Twain					A	
Competence Management		JOH001	Michael-Stark Johns	Michael-Stark@TEST ALPHA v2.4.0.0 DB.	Markus Arilius Ste					A	
management		CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						A	
		TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	A	
Payroll Data	P	MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			A	
		TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						Α	
	- 1	BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			Α	
		E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						A	
		E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A	
	2	MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				A	
Custom Details		DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						Α	
		DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						Α	
		DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						Α	
		DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	Α	
Loans		THO001	Mary Thompson	Mary@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					Α	
		DAN001	Sabelo Danisa	Sabelo@TEST ALPHA v2.4.0.0 DB.co.za						Α	
		NDW001	Sne Ndwalane	snenhlanhla.ndwalane@co3.co.za		Sales				Α	
		PLV001	Arial Plutha	Avial@TECT ALOUA VO 4 0 0 DP co 75	Pinnen Du Tait	Calor					

# **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.
  - $^\circ~$  Either type the new information in the field, or if necessary,

*delete* the text that is there and type in the new information.



Home Equipme	ent / Locations Contro	1 act Finance / HR Inventor		Version 2.5.0.0 - Example Context				Reporting	Utilities			_ 0	
Save Back Save Layou	t Workspaces		ry manifernance principee	ear reandraceaning in ocean	inci	it suice	JU VICE	reporting	3				
Processing A Fo	Employee Number	MUD001	Physical Address	1 2	D	ependants						_	
inter text to search P	First Name	Judith	*	Main Street	r,								
	Second Name			Main Town	-					1		1	
Addresses	Initials	3	* City	Main City		HirstName REC		astName IDN	4	rthDate	Relation	IsDepend	sant
	Last Name	Mudzengi	<ul> <li>Province</li> </ul>	Main Province	H	-	-	_	-		-	Yes	
	ID Number		Postal Code	MAIN	*		0.000	logonico Tre		0,00,2017	critic Dependent	100	
Overtime and Holidays	Birth Date		Country	South Africa									
	Phone Number (W)	123 456 7890											
Competence	Extension(W)		Postal Address		S	hifts							
Management	Phone Number (H)	987 654 3210			6								
	Fax Number				H	StartDate	ShiftN		StartDay	StartDateK	ov	/	
Pavrol Data	Mobile Number		City		ę	=	FD:	unic	=	=	- /		
	Email Address	Judith@TEST ALPHA v2.4.0.0 DB	Province			01/01/2020	Norma	l Week		L	12		
	Passport Number		Postal Code		*								
Banking Details	Marital Status	Married -	Country		1								
	Manager	Bianca Du Toit 🔎			H								
		Sales Department 🖉 🖉				rafts							
Custom Details	User ID	JudithM ,P			0								
	Bank Name	First National Bank 🔹	Branch Name	2		CraftName					ode CostEstimate		
	Account Name	M	Branch Code	3	٩	a 🖬 c	1 <b>0</b> :	a 🖸 c	a <b>D</b> c	• <b>D</b> :	-	-	
Loans	Account Number	1	Account Type	Current Account	1	ADMN TECH	Administration		1100	2100	150.00		
	Default Account	V					Technician	Durban	1100	2100	1,000.00	1,000.0	UU

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.

Home Equipment	nt / Locations Contra	act Finance / HR Inventory		Version 2.5.0.0 - Example Con ts Manufacturing Procure			Service	Reporting	Utiliti	es			- 8	
ave Back Save Layout	Workspaces													
nks a	Employee Number	MUD001	Physical Address	1	Der	pendants				-1				1
ter text to search P	First Name	Judith	•	Main Street	-									
	Second Name			Main Town	1		header here to						1	
Addresses	Initials	J	City	Main City	+		MiddleName	I astriame		er Birl	hDate	Relation	IsDependa	ant
	Last Name	Mudzengi	Province	Main Province		Chervl	Grace	-	ZAR 1234			Child Dependant	-	
	ID Number		Postal Code	MAIN	*	chery	or dec	riagoniae	DITTED	10 2.0	0 (12021	erno ocpensorie	100	
Overtime and Holidays	Birth Date	05/04/2005 👻	Country	South Africa										
	Phone Number (W)	123 456 7890			1									
0-1	Extension(W)		Postal Address		Shi	fts								
Competence Management	Phone Number (H)	987 654 3210												
	Fax Number				·	StartDate	Shift				StartDatek		/	
Pavrol Data	Mobile Number				X		shire I C	vame	54	,	-	ey		
Payron Data	Email Address	Judith@TEST ALPHA v2.4.0.0 DB				01/01/2020		al Week		1		12		
	Passport Number	3	Employe	ee : MUD001 has been saved		01/01/2020	Horn	GIVEEN				**		
Banking Details	Marital Status		- Cimpioye											
our wing occurs	Manager	Bianca Du Toit 🔎			a b									_
	Department	Sales Department 🖉 🖉	4	ОК	a	fts								
Custom Details	User ID	JudithM ,P			tor a									
	Bank Name	First National Bank 🔹	Branch Name	2		CraftName	CraftDesc	SiteDesc	ription A	ccountCode		ode CostEstimate	Rate	
	Account Name		Branch Code	-	9	a <mark>n</mark> c	*Oc	a 🖬 c	ą	0 c	• <b>•</b> •	-	-	
Loans	Account Number			Current Account		ADMN	Administration			100	2100	150.00		
	Default Account	-				TECH	Technician	Durban	1	100	2100	1,000.00	1,000.0	0
					*									



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*.

Home Equipmen			loyees - BPO: Version 2.5.0.0 - Example	company v2.5.0.0	,				
	nt / Locations Contra	ct Finance / HR I	nventory Maintenance / Projects Manu	afacturing Procure	ement Sales	Service	Reporting U	ilities	- 8
Add Edit Delete View			Export Refresh Print						
inks A									
nter text to search 🔎 -	EmployeeNumber	FullName	EmailAddress	Manager	Department	PhoneNumber	MobileNumber	Extension	Status
Addresses	P #00	n 🗖 c	R C	n <b>D</b> c	A D C	* <b>0</b> 0	R <b>O</b> C	* <b>0</b> 0	* <b>0</b> 0
riddi Cooco	DUT001	Bianca Du Toit	kameshni.pillay@co3.co.za	Belinda Sharman	Sales	031 123 4564	083 123 4567	1234	A
	SHA001	Belinda Sharman	Belinda@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
Overtime and	HAR001	Wesley Haynes	Wesley@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit					A
Holidays	BAL001	Steven Cooper	Steven@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
	You001	Karlien Jessica You	Karlien Jessica@TEST ALPHA v2.4.0.0 DB						A
	RED001	George James Red	George James@TEST ALPHA v2.4.0.0 DB	Wesley Haynes					A
Competence Management	EMP123	Carolina Suzzetta L	Carolina Suzzetta@TEST ALPHA v2.4.0.0	Bianca Du Toit					Α
	DG001	John Twain	John@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman					A
	STE001	Markus Arilius Stev	Markus Arilius@TEST ALPHA v2.4.0.0 DB	John Twain					Α
Payroll Data	JOH001	Michael-Stark Johns.	. Michael-Stark@TEST ALPHA v2.4.0.0 DB	Markus Arilius Ste					Α
	CO3	CO3 Administrator	CO3@TEST ALPHA v2.4.0.0 DB.co.za						Α
	TAD009	Theo Peterson	Theo@TEST ALPHA v2.4.0.0 DB.co.za	Belinda Sharman		031 258 1425	083 258 1425	198	Α
Banking Details	MUD001	Judith Mudzengi	Judith@TEST ALPHA v2.4.0.0 DB.co.za	Bianca Du Toit	Sales	123 456 7890			Α
	TIM	Joseph Timber	Joseph@TEST ALPHA v2.4.0.0 DB.co.za						Α
	BEN	Ben Johnson	Ben@TEST ALPHA v2.4.0.0 DB.co.za	Steven Cooper		031 123 4567			Α
Custom Details	E147282	Jade Rivers	Jade@TEST ALPHA v2.4.0.0 DB.co.za						Α
	E987654	Jeff Rivers	Jeff@TEST ALPHA v2.4.0.0 DB.co.za						A
	MIL001	Abigail Milne	Abigail@TEST ALPHA v2.4.0.0 DB.co.za		Sales				Α
Loans	DUT004	Test Employee	Test@TEST ALPHA v2.4.0.0 DB.co.za						A
Loans	DUT005	Mary Saunders	Mary@TEST ALPHA v2.4.0.0 DB.co.za						A
	DUT002	Tammy Du Toit	Tammy@TEST ALPHA v2.4.0.0 DB.co.za						A
	DUT010	Bianca Surendorff	Bianca@TEST ALPHA v2.4.0.0 DB.co.za			031 123 4564	083 123 4567	1234	A

## **DELETE DEPENDANT DETAILS**

- 1. The *Edit Employee* screen will open.
- 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.



ave Back Save Layout	t Workspaces												
Processing _ For	rmat 4												4
inks 4	Employee Number		<ul> <li>Physical Address</li> </ul>	26 River Road	D	ependants							
nter text to search P	First Name	Theo	Forest Hills	Drag a column header here to group by that column									
	Second Name	Peter		North Subur		FirstName	MiddleName	LastName ID	Number B	rthDate	Relation	IsDepe	endan
Addresses	Initials	ננד	* City	Durban 2	۰,	10:	REC			=	RDC	FOC	
	Last Name	Peterson	<ul> <li>Province</li> </ul>	KwaZulu Natal	• 7	Sarah	Mae	Peterson 12	345670 1	0/02/2021	Adult Dependant	Yes	
Overtime and	ID Number	771106300026087	Postal Code	1234		P	rocess	<b>^</b>					
Holidays	Birth Date	06/11/1978 🔹	Country	South Africa			n Dependant			3			
	Phone Number (W)	031 258 1425					Add new dep	endant 🗍	1200				
Competence	Extension(W)	198	Postal Address		s	hifts	Delete Delete deper	vdant 🖌	-				
Management	Phone Number (H)	031 654 1234				ran a column	header here to						
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Payron Data	Email Address	Theo@TEST ALPHA v2.4.0.0 DB.	Province		1				-	-	_		
	Passport Number	1593574862	Postal Code		÷Ľ								
Banking Details	Marital Status	Single 🔹	Country		-								
burning octors	Manager	Belinda Sharman 🖉 🔎			- 🖵								
	Department	م			C	rafts							
Custom Details	User ID	Q			C								
	Bank Name		Branch Name		- 1	CraftName	CraftDesc	SiteDescripti	on AccountCod	e COSAcc	Code CostEstimate	Rate	
	Account Name	•	Branch Code		9	(D)	a 🖬 c	* <b>0</b> :	8 <b>0</b> 0	R <b>O</b> C	-	-	
Loans	Account Number		Account Type		+	ADMN	Administration	Durban	1100	2100	0.0	0	0.00
	Default Account		Account Type										

## **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.

Home Equipm	ent / Locations Contra	act Finance / HR II	Edit Employee - BPO: nventory Maintenance / Project	Version 2.5.0.0 - Example Con ts Manufacturing Procure			Service	Reporting	Utiliti	es			- 6		
	ut Workspaces	1												4	
iks 4	Employee Number	TAD009	Dependants									4			
ter text to search 🔎	First Name	TAD009     *     Physical Address     26 River Road     *     Theo     *     Forest Hils				Drag a column header here to group by that column									
	Second Name	Peter		North Subur	i		MiddleName				hDate	Relation	IsDeper	odao	
Addresses	Initials	ן ננז	Delete Dependant	×	Ι.	+IISUNAIIIE +EK	REC.	allo	REC.	5 Dire		REISCON	FD:	luan	
	Last Name	Peterson				Sarah	-	Peterson	1234567	10/		Adult Dependant	Yes		
Overtime and	ID Number	771106300026087	Are you sure you want to delete	this dependant Sarah?											
Holidays	Birth Date				i										
	Phone Number (W)				L										
Competence	Extension(W)	198		s No	S	hifts									
Management	Phone Number (H)	031 654 1234			Drag a column header here to group by that column										
	Fax Number				i-	StartDate	Shift				StartDateK	ev l	6		
Pavrol Data	Mobile Number	083 258 1425	City		ę	-	4 <b>0</b> 0		-	,	-	,			
	Email Address	Theo@TEST ALPHA v2.4.0	.0 DB./ Province												
	Passport Number	1593574862	Postal Code												
Banking Details	Marital Status	Single	<ul> <li>Country</li> </ul>												
	Manager	Belinda Sharman	Q			-									
	Department		Q			rafts									
Custom Details	User ID		Q		D										
	Bank Name		+ Branch Name				CraftDesc					ode CostEstimate	Rate		
	Account Name		Branch Code		E	·D:	a 🖬 c	1 <b>0</b> 0	-	<b>.</b>	a <b>n</b> c	-	-		
Loans	Account Number		Account Type	•	H-	ADMN	Administration	Durban	1	100	2100	0.0	0 0	0.00	
	Default Account				*										

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



	ent / Locations Contro	act Finance / HR Inventory	Maintenance / Projec	ts Manufacturing Proc	urement Sales	Service	Reporting	Utilities			- 8	-	
H 🕒 🔣													
ave Back Save Layou	t Workspaces												
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Processing a Fo	Employee Number	TAD009 *	Physical Address	26 River Road	Dependants								
nter text to search P	First Name		,	Forest Hills	_								
	Second Name			North Subur							1		
Addresses	Initials		City	Durban		MiddleName					IsDependar	nt	
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		771106300026087	Postal Code		*								
Overtime and Holidays	Birth Date			South Africa	-	4							
Thindaya	Phone Number (W)		,	Journance	-	1							
	Extension(W)		Postal Address		Shifts	1						1	
Competence Management	Phone Number (H)	031 654 1234	Postal Address		Drag a column header here to group by that column								
	Fax Number	031 789 1414								11	1		
	Mobile Number	083 258 1425	City		StartDate	Shift	lame	StartDay	StartDateKe	Y			
Payrol Data	Email Address	Theo@TEST ALPHA v2.4.0.0 DB.	Province		Ŷ -	a 🗖 c		-	-	_			
	Passport Number	1593574862	Postal Code		*								
Banking Details	Marital Status	Single 👻	Country		-								
ballking Details	Manager	Belinda Sharman P			_							_	
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	Bank Name		Branch Name	-	CraftName	CraftDesc	SiteDescript	ion AccountCode	e COSAccCo	de CostEstimate	Rate		
	Account Name	•	Branch Code		۰۵:	a <b>n</b> c	• <b>E</b> :	• <b>•</b> ••	a <b>n</b> c	-	-		
Loans	Account Number		Account Type		► ADMN	Administration	Durban	1100	2100	0.00	0.00	)	
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	Default Account												

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