

# HUMAN RESOURCES

## VIEW, ADD, EDIT, DELETE SHIFTS

Setting up shifts is important for [Workload Scheduling](#) and [SLA Monitoring](#).

**1** normal work week shift is required for technicians and SLA monitoring.

Additional shifts can be added for customers that have different trading hours, and subsequently linked to the relevant employee(s).

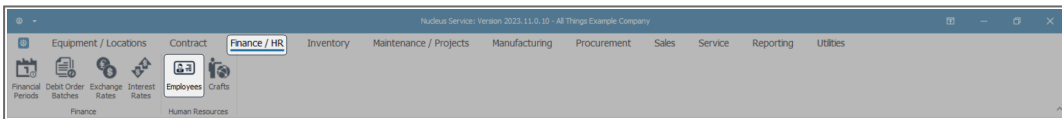
Normally, shifts will have **7** days (for a standard week).

The **Shifts** docking panel lists all the shifts assigned to the **selected** employee.

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### Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will display.

## VIEW SHIFTS

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### SELECT EMPLOYEE

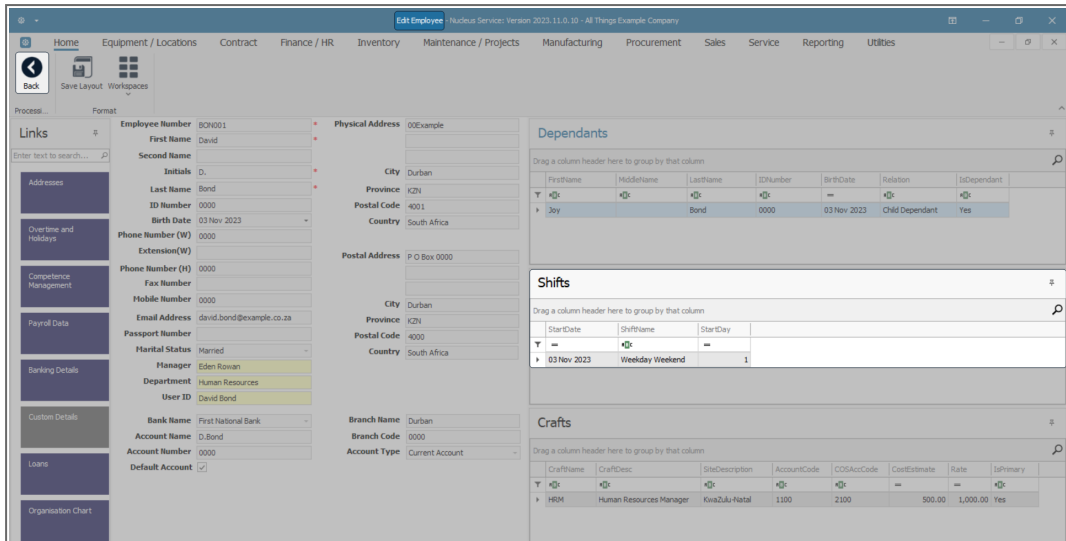
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- Select the row of the **employee** for whom you wish to **view** the linked Shifts.
- Click on **View**.

ID	Employee Number	Full Name	Email Address	Manager	Department Name
982	DUN167	Dario Dunlap	dario.dunlap@attexampledomain.co.za	Elsao Felix	Stock Control
590	CAN553	Dash Cannon	dash.cannon@attexampledomain.co.za	Wesson Reese	Engineering
886	MED494	Devian Medina	devian.medina@attexampledomain.co.za	Alanna Robertson	Sales
1017	BON001	David Bond	david.bond@attexampledomain.co.za	Eden Rowan	Human Resources
606	FAR373	David Parsons	david.parsons@attexampledomain.co.za	Timothy Palacios	Operations
10	STAR445	David Stanley	david.stanley@attexampledomain.co.za	Grady Pierce	Development
528	MUR976	Dean Murphy	dean.murphy@attexampledomain.co.za	Brocken Duran	Contracts
186	MAL111	Declan Malone	declan.malone@attexampledomain.co.za	Leslie Miles	Manufacturing
331	ARE958	Dellah Arellano	dellah.arellano@attexampledomain.co.za	Malaysia Price	0
967	PET789	Dellah Petersen	dellah.petersen@attexampledomain.co.za	Addlyn Washington	Projects
712	CHE105	Demetrius Cherry	demetrius.cherry@attexampledomain.co.za	Jaxson Maddox	Projects
449	NIE946	Dense Nielsen	dense.nielsen@attexampledomain.co.za	Colette Ruiz	Purchasing
62	CLE503	Denver Clements	denver.clements@attexampledomain.co.za	Dulce Nixon	Administration
924	WOO173	Denver Woodward	denver.woodward@attexampledomain.co.za	Wesson Acevedo	Quality Assurance
98	WOO451	Derek Wood	derek.wood@attexampledomain.co.za	Kace Tate	Security
580	ROD946	Derrick Roales	derrick.roales@attexampledomain.co.za	Kerov Greene	Accounts
365	ROT013	Destiny Roth	destiny.roth@attexampledomain.co.za	Elijah Kraussman	Sales
456	L1189	Devon Li	devon.li@attexampledomain.co.za	Timothy Palacios	Projects
364	COH897	Dexter Cohen	dexter.cohen@attexampledomain.co.za	Martin Stephens	Sales
357	KAN918	Diana Kane	diana.kane@attexampledomain.co.za	Mao Doyle	Stock Control
894	HEN232	Dillon Henry	dillon.henry@attexampledomain.co.za	Elsao Felix	Administration
286	FOR145	Dior Ford	dior.ford@attexampledomain.co.za	Malaysia Price	0
810	BLA806	Dominic Blake	dominic.blake@attexampledomain.co.za	Sofia Simmons	Manufacturing
686	ROL915	Dominic Rollins	dominic.rollins@attexampledomain.co.za	Carmen Carey	Administration
488	POW963	Donald Powell	donald.powell@attexampledomain.co.za	Eden Rowan	Executive Committee
490	BAU587	Donovan Bauer	donovan.bauer@attexampledomain.co.za	Zayd Singleton	Implementations

## VIEW LINKED SHIFTS

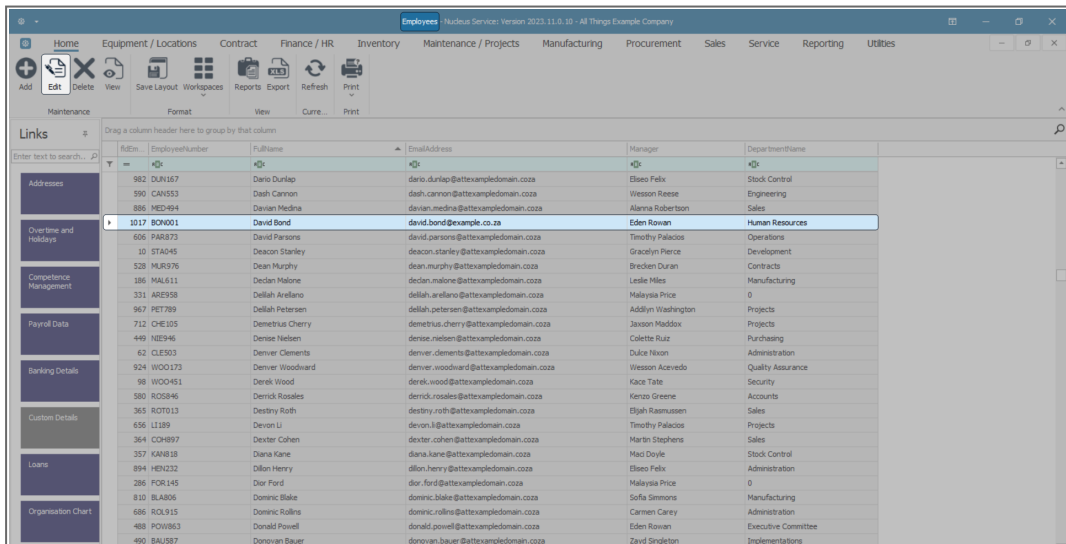
- The **Edit Employee** screen will open.
  - **Note:** Although this screen title is named '**Edit Employee**', this is a **view only** screen - you will notice that there is only a **Back** button, therefore you cannot make or save changes in this screen.
- The **Shifts** frame is located in the middle right of this screen.
- Here you can **view** the **Shifts** linked to the selected employee.
- When you have finished viewing the details, click on **Back** to return to the **Employees** listing screen.



## ADD SHIFT

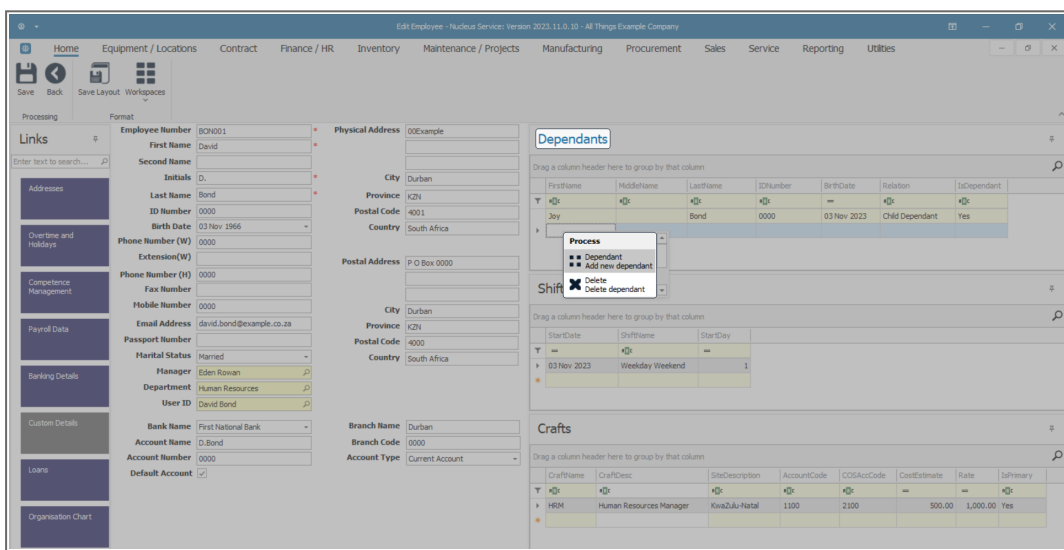
## SELECT EMPLOYEE

- In the **Employees** listing screen -
- Select the row of the **employee** for whom you wish to **assign** a Shift to.
- Click on **Edit**.



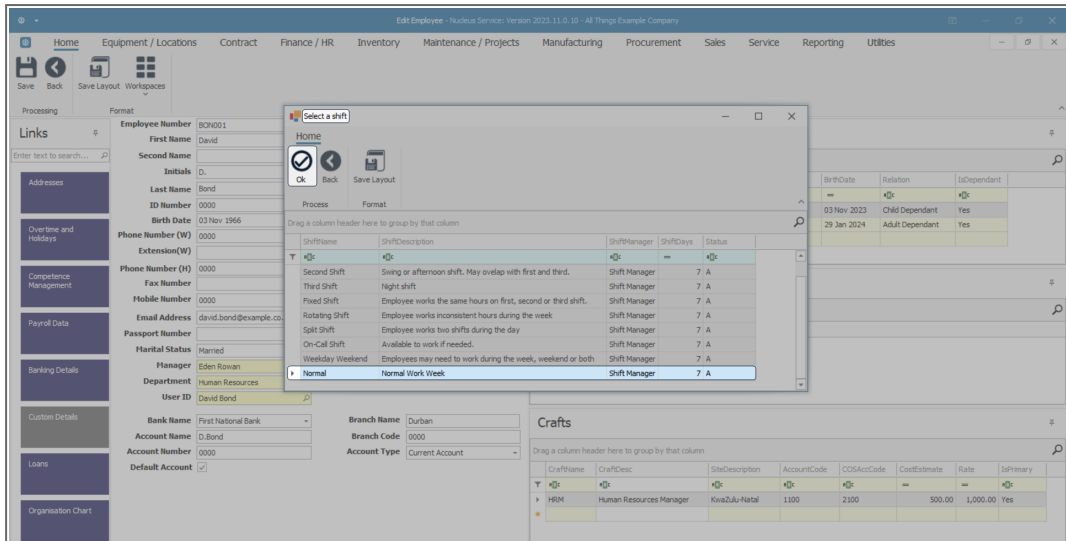
## ADD NEW SHIFT

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

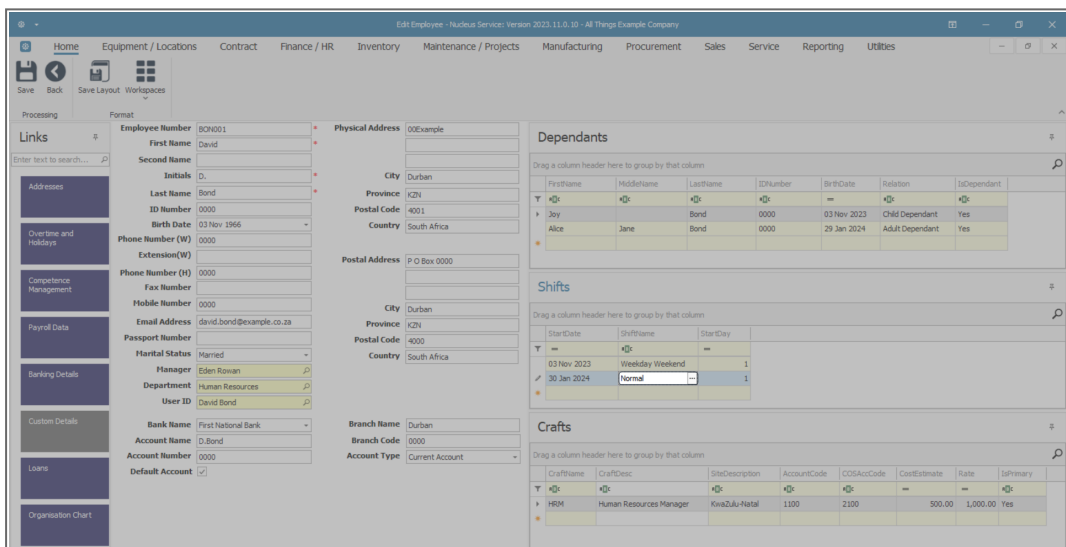


## SELECT SHIFT

- A **Select a shift** screen will pop up.
- Select the **row** of the Shift you wish to assign to this employee.
- In this example, **Normal Work Week** is selected.
- Click on **Ok**.

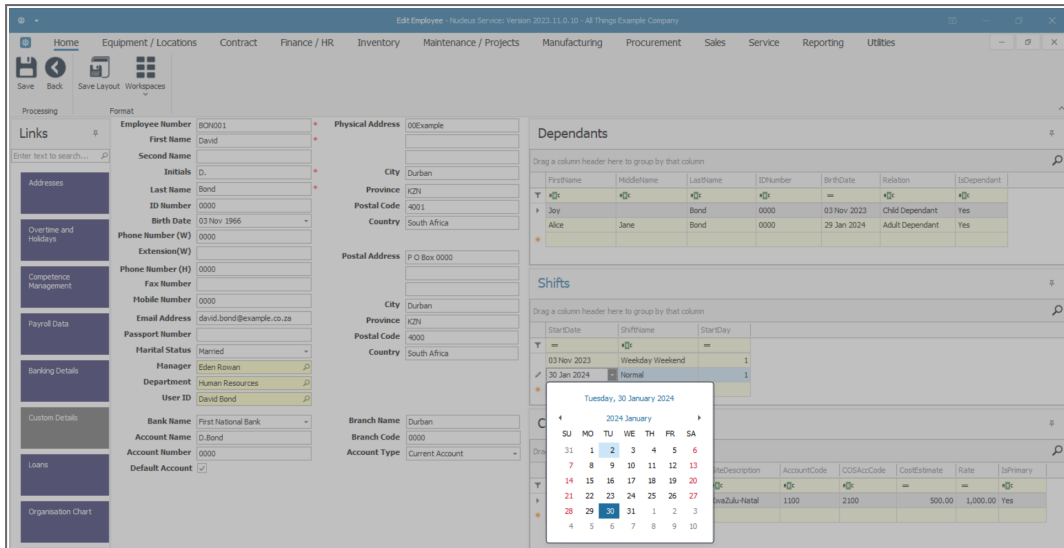


- The selected shift will now be displayed in the **Shift Name** column of the **Shifts** docking panel.

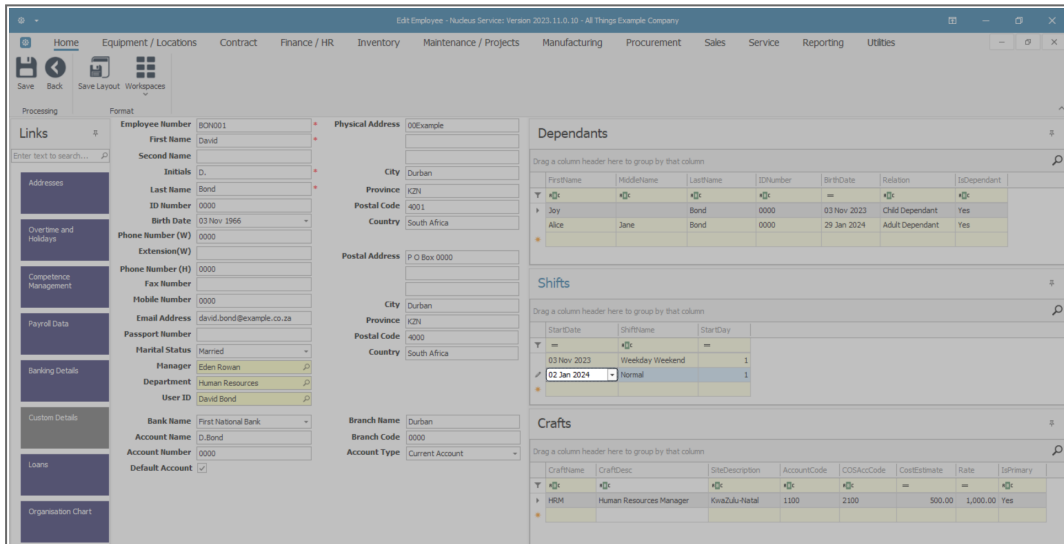


## SELECT START DATE

- The **Start Date** column will auto populate with the current date.
- Click on the **drop-down arrow** in the date field to display the **calendar**.
- Click on the correct **start date**.

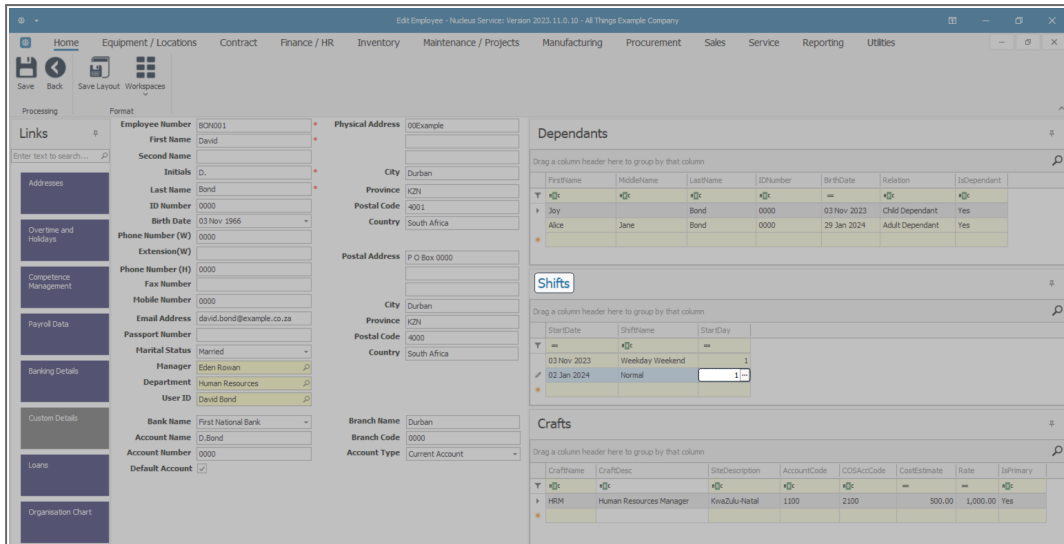


- The selected date will now be displayed in the **Start Date** column.



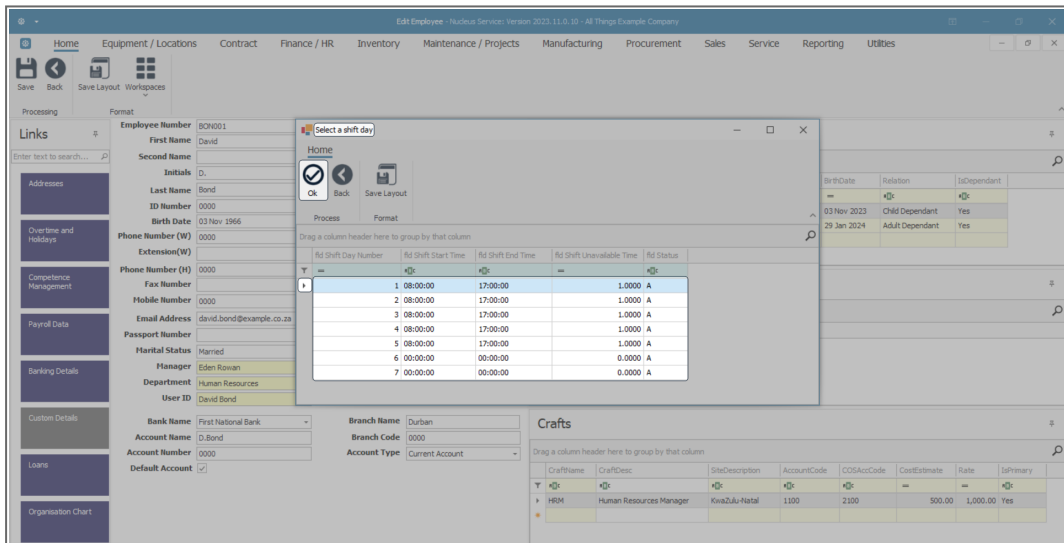
## SELECT START DAY

- Scroll right in the Shifts panel to the **Start Day** column and click in this field.
- An **ellipsis button** will be revealed, click on this button.



The **Select a shift day** look up screen will pop up.

- Click on the **row selector** in front of the appropriate start day number: (Monday = **1**, Tuesday = **2**, Wednesday = **3**) etc.
- Click on **Ok**.



- The selected start day will now be displayed in the **Start Day** column.

## SAVE SHIFT ASSIGNMENT

- When you have finished adding the shift details to this employee, click on **Save**.

The screenshot shows the 'Edit Employee' form for employee BOND001. The 'Shifts' section is expanded, showing a table with the following data:

Start Date	Shift Name	Start Day
03 Nov 2023	Weekday Weekend	1
02 Jan 2024	Normal	1

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

The screenshot shows the same 'Edit Employee' form as above, but with a confirmation message box overlaid in the center. The message box contains the text: "Employee: BOND001 has been saved" and an "OK" button.



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

## EDIT SHIFTS

### SELECT EMPLOYEE

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

EmployeeID	EmployeeNumber	FullName	EmailAddress	Manager	DepartmentName
391	PIE301	Jamena Pierce	jamena.pierce@texampledomain.co.za	Maryam Duffy	Maintenance
832	JEF576	Joquan Jefferson	joquan.jefferson@texampledomain.co.za	Kace Dickson	Service Centre
225	BRAS55	Jocelyn Bradley	jocelyn.bradley@texampledomain.co.za	Alexandria Hujrh	Implementations
861	DAV282	Joelyn David	jocelyn.david@texampledomain.co.za	Sofa Simons	Operations
557	YOU418	Jocelyn Young	jocelyn.young@texampledomain.co.za	Donald Powell	Administration
874	VAR854	Joey Vargas	joev.vargas@texampledomain.co.za	Sofa Simons	Security
322	KER609	Johan Kerr	johan.kerr@texampledomain.co.za	Marlon Hopkins	Development
1014	CHA001	John Chase	JohnC@texample.co.za	CO3 Administrator	Human Resources
196	PCR926	Jonathan Porillo	johnathan.porillo@texampledomain.co.za	Mordcheh Aguirre	Quality Assurance
412	CAR677	Jonah Carson	jonah.carson@texampledomain.co.za	Odi Montes	Service Centre
280	GRA321	Jordan Gray	jordan.gray@texampledomain.co.za	Eden Roman	Executive Committee
487	MA5433	Jarlyn Massey	jarlyn.massey@texampledomain.co.za	Donald Powell	Engineering
776	AND781	Jorge Andrade	jorge.andrade@texampledomain.co.za	Carmen Carey	Service Centre
94	CHA653	Josue Chandler	josue.chandler@texampledomain.co.za	Dulce Nixon	Administration
721	O'CONNELL	Journey O'Connell	journey.oconnell@texampledomain.co.za	Carmen Carey	Sales
595	WH5873	Journ Whitehead	journ.whitehead@texampledomain.co.za	Timothy Palacos	Implementations
722	MO5336	Jovanni Moses	jovanni.moses@texampledomain.co.za	Nicolas Person	Security
940	AVI715	Juan Avalos	juan.avalos@texampledomain.co.za	Elseo Felix	Accounts
922	MON202	Juan Monroe	juan.monroe@texampledomain.co.za	Luis Lim	Purchasing
16	DOX948	Judson Donaldson	judson.donaldson@texampledomain.co.za	Elanna Pugh	Human Resources
612	CUE921	Julie Curran	julie.curran@texampledomain.co.za	Austin Nolan	Quality Assurance
1004	KES237	Julinda Kessler	julinda.kessler@texampledomain.co.za	Marc Resbold	0
725	BOY031	Julia Boyle	julia.boyle@texampledomain.co.za	Carmen Carey	Service Centre
790	FLO352	Julian Flores	julian.flores@texampledomain.co.za	Michal Whitaker	Maintenance
765	CAS591	Juliana Castro	juliana.castro@texampledomain.co.za	Carmen Carey	Administration
405	FLO053	Julanna Floyd	julanna.floyd@texampledomain.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.

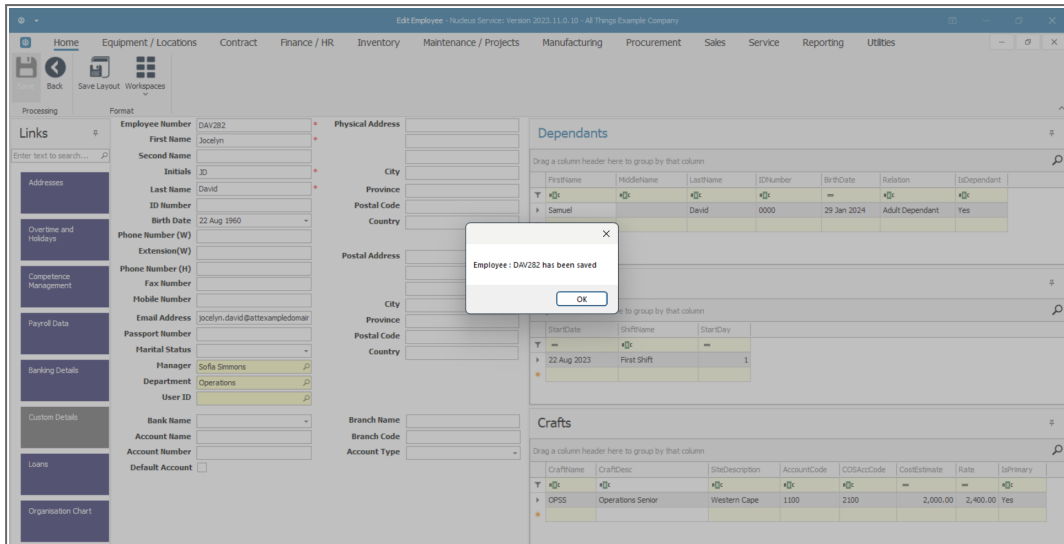
The screenshot shows the 'Edit Employee' form in the CO3 system. The form is divided into several sections:

- Links:** A sidebar on the left with categories like Addresses, Overtime and Holidays, Competence Management, Payroll Data, Banking Details, Custom Details, Loans, and Organisation Chart.
- Employee Information:** Fields for Employee Number (DAV282), First Name (Jocelyn), Second Name, Initials (JD), Last Name (David), ID Number, Birth Date (22 Aug 1960), Phone Number (W), Extension (W), Phone Number (H), Fax Number, Mobile Number, Email Address (jocelyn.david@textampledomain), Passport Number, Marital Status, Manager (Sofa Simmons), Department (Operations), and User ID.
- Physical Address:** Fields for City, Province, Postal Code, and Country.
- Postal Address:** Fields for City, Province, Postal Code, and Country.
- Branch Information:** Fields for Branch Name, Branch Code, and Account Type.
- Dependants:** A table with columns: First Name, Middle Name, Last Name, ID Number, Birth Date, Relation, and Is Dependent. One entry is visible: Sam, David, 0000, 29 Jan 2024, Adult Dependant, Yes.
- Shifts:** A table with columns: Start Date, Shift Name, and Start Day. One entry is visible: 22 Aug 2023, First Shift, 1.
- Crafts:** A table with columns: Craft Name, Craft Desc, Site Description, Account Code, CO3 Acc Code, Cost Estimate, Rate, and Is Primary. One entry is visible: OPS, Operations Senior, Western Cape, 1100, 2100, 2,000.00, 2,400.00, 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**.

EmpID	EmployeeNumber	FullName	EmailAddress	Manager	DepartmentName
556	GL609	Baylor Gilbert	baylor.gilbert@texampledomain.co.za	Donald Powell	Quality Assurance
689	GOL305	Beatrice Golden	beatrice.golden@texampledomain.co.za	Leslie Donaldson	Contracts
173	WAR746	Beatrice Warren	beatrice.warren@texampledomain.co.za		Executive Committee
734	BAR766	Beckett Barr	beckett.barr@texampledomain.co.za	Moses Barrera	Operations
353	SAN366	Belen Sandoval	belen.sandoval@texampledomain.co.za	Leona Phillips	Security
915	AV6895	Bella Avery	bella.avery@texampledomain.co.za	Saoul Wright	Marketing
529	CH4938	Bella Chase	bella.chase@texampledomain.co.za	Donald Powell	Contracts
279	BR0937	Belamy Brooks	belamy.brooks@texampledomain.co.za	Malaysia Price	Engineering
388	CRO731	Bentlee Cross	bentlee.cross@texampledomain.co.za	Ayla Pitman	0
206	FLA129	Bentlee Fuller	bentlee.fuller@texampledomain.co.za	Aydin Knight	Stock Control
378	BAR669	Bentley Barrett	bentley.barrett@texampledomain.co.za	Ayla Pitman	Contracts
14	KAN277	Bentley Kane	bentley.kane@texampledomain.co.za	Elanna Pugh	Engineering
837	MAR315	Bethany Marshall	bethany.marshall@texampledomain.co.za	Sofia Simons	Administration
1005	DUT517	Bianca DuToit	emalaad@email.com	Marc Repsold	Quality Assurance
282	DO686	Bishop Dodson	bishop.dodson@texampledomain.co.za	Otis Morgan	Implementations
729	GL293	Blair Giles	blair.giles@texampledomain.co.za	Carmen Carey	Service Centre
329	CH4597	Blaire Chase	blaire.chase@texampledomain.co.za	Ella Taylor	Implementations
462	VIN713	Blaire Vincent	blaire.vincent@texampledomain.co.za	Ayla Pitman	Stock Control
746	PH285	Blaire Phillips	blaire.phillips@texampledomain.co.za	Carmen Carey	0
636	AYE133	Boden Ayers	boden.ayers@texampledomain.co.za		Executive Committee
272	BAI404	Bodie Bailey	bodie.bailey@texampledomain.co.za	Malaysia Price	Operations
944	SLM941	Boone Summers	boone.summers@texampledomain.co.za	Jack Holmes	Contracts
520	OWE129	Brandon Owen	brandon.owen@texampledomain.co.za	Isaac Gould	Service Centre
354	JAC319	Brandley Jacobs	brandley.jacobs@texampledomain.co.za	Malaysia Price	Security
918	CAR723	Braxton Carpenter	braxton.carpenter@texampledomain.co.za	Elaeo Felix	Operations
780	HAY103	Brayden Haynes	brayden.haynes@texampledomain.co.za	Kate Calhoun	Sales

## DELETE DEPENDANT DETAILS

- The **Edit Employee** screen will open.
- In the **Dependants** frame, **right click** in the **row** of the dependant you wish to delete.
- A **Process** menu will pop up.
- Select **Delete - Delete dependant**.

The screenshot shows the 'Edit Employee' screen for employee CH4938 (Bella Chase). The 'Dependants' section contains a table with the following data:

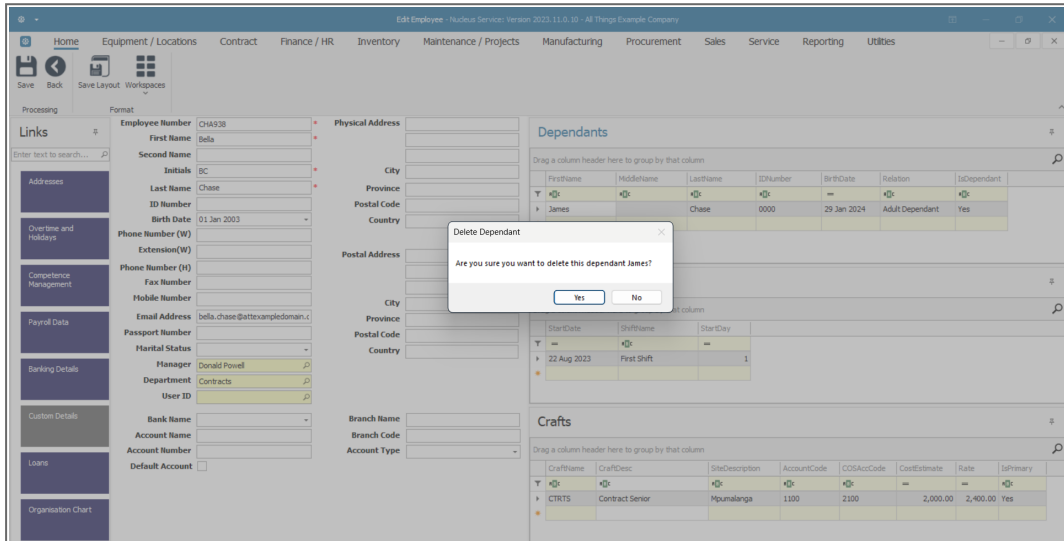
First Name	Middle Name	Last Name	ID Number	Birth Date	Relation	Is Dependent
		Chase	0000	29 Jan 2024	Adult Dependent	Yes

A context menu is open over the first row of the dependants table, showing the following options:

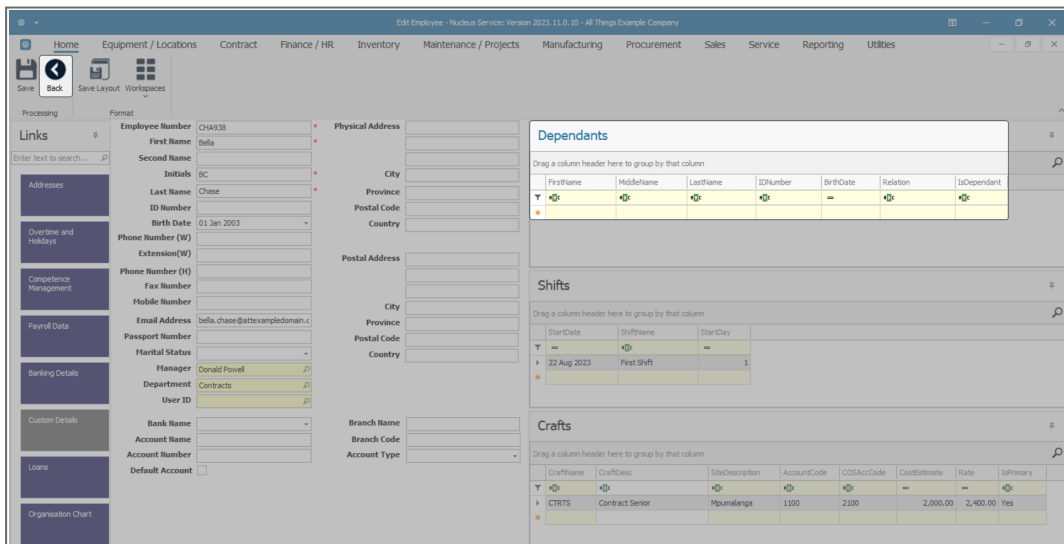
- Process
- Dependent
- Add new dependant
- Delete - Delete dependant (highlighted)

## 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.



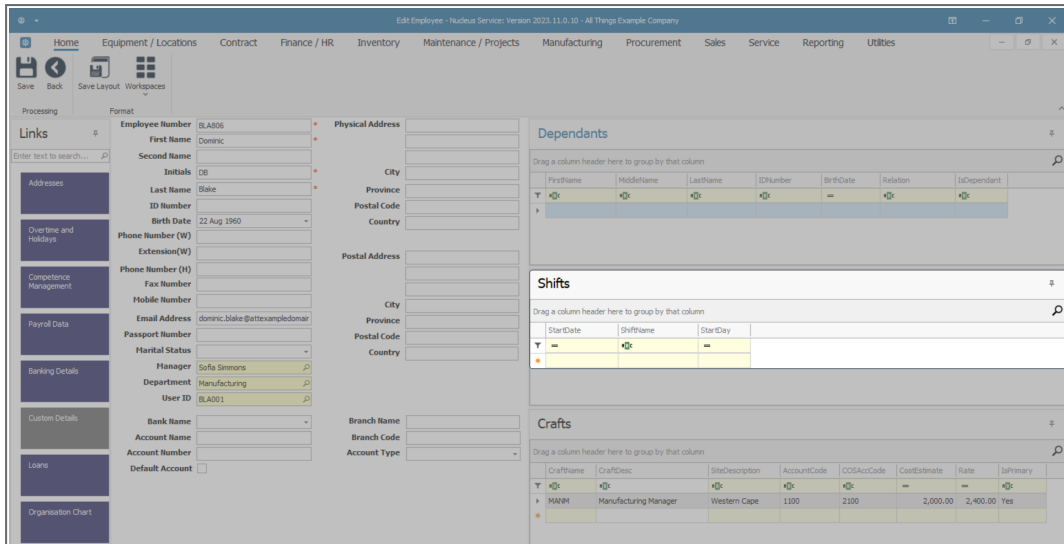
## VIEW SHIFTS

### SELECT EMPLOYEE

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

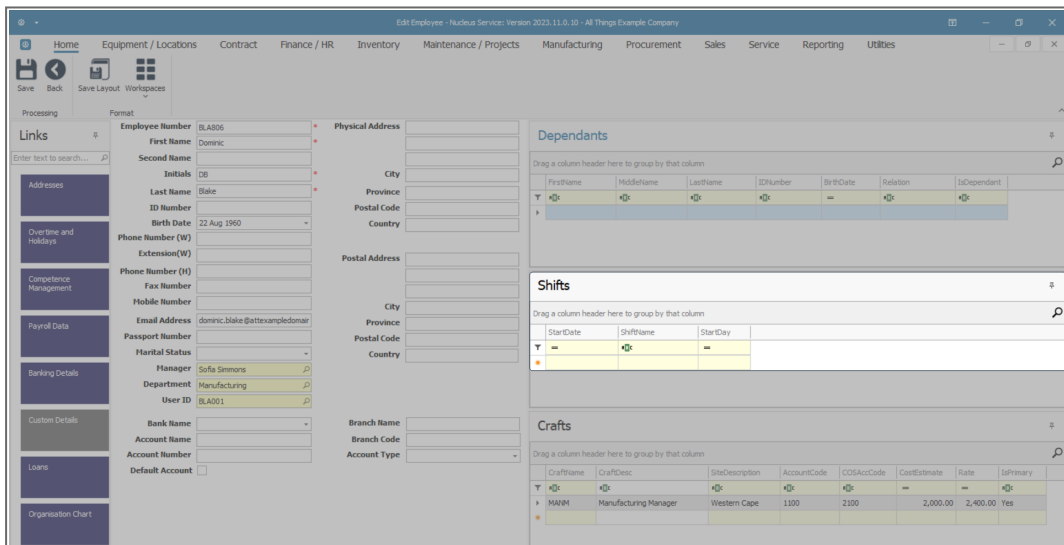
ID	Employee Number	Full Name	Email Address	Manager	Division Name
365	R07013	Destiny Roth	destiny.roth@attexampdomain.co.za	Elijah Rasmussen	Sales
656	L1189	Devon Li	devon.li@attexampdomain.co.za	Timothy Palacios	Projects
364	COH997	Dexter Cohen	dexter.cohen@attexampdomain.co.za	Marin Stephens	Sales
357	KAB18	Diana Kane	diana.kane@attexampdomain.co.za	Maai Doyle	Stock Control
894	HEX232	Dillon Henry	dillon.henry@attexampdomain.co.za	Elaeo 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 Roman	Executive Committee
490	BAU587	Donovan Bauer	donovan.bauer@attexampdomain.co.za	Zayd Singleton	Implementations
710	PAD055	Donovan Padilla	donovan.padilla@attexampdomain.co.za	Carmen Carey	Operations
57	NEL986	Drew Nelson	drew.nelson@attexampdomain.co.za	Kerij Faulkner	Service Centre
925	VAN232	Drew Vance	drew.vance@attexampdomain.co.za	Elaeo Felix	Quality Assurance
119	NDX54	Dulce Nixon	dulce.nixon@attexampdomain.co.za	Giovanni Brooks	Executive Committee
212	COM114	Dustin Compton	dustin.compton@attexampdomain.co.za	Leslie Miles	Accounts
58	EDW218	Dylan Edwards	dylan.edwards@attexampdomain.co.za	Kerij Faulkner	Service Centre
771	KIM723	Dylan Kim	dylan.kim@attexampdomain.co.za	Jula Boyle	Service Centre
484	PAT439	Easton Patrick	easton.patrick@attexampdomain.co.za	Donald Powell	Development
124	POW263	Easton Powell	easton.powell@attexampdomain.co.za	Dulce Nixon	0
195	CAR636	Elden Cardenas	elden.cardenas@attexampdomain.co.za	Leslie Miles	Purchasing
2	ROW002	Eliem Rowan	eliem.rowan@attexampdomain.co.za	Leslie Miles	Executive Committee
266	TUC402	Edvin Tucker	edvin.tucker@attexampdomain.co.za	Juliette Becker	Service Centre
775	L1167	Eileen Li	eileen.li@attexampdomain.co.za	Jorge Andrus	Service Centre
421	MUN726	Elaia Munoz	elaia.munoz@attexampdomain.co.za	Ayla Pittman	Administration
783	YAT627	Eleanor Yates	eleanor.yates@attexampdomain.co.za	Jorge Andrus	Service Centre
362	RAS095	Elijah Rasmussen	elijah.rasmussen@attexampdomain.co.za	Langston McMahon	Sales

- The **Edit Employee** screen will open where you will see the Shifts frame.



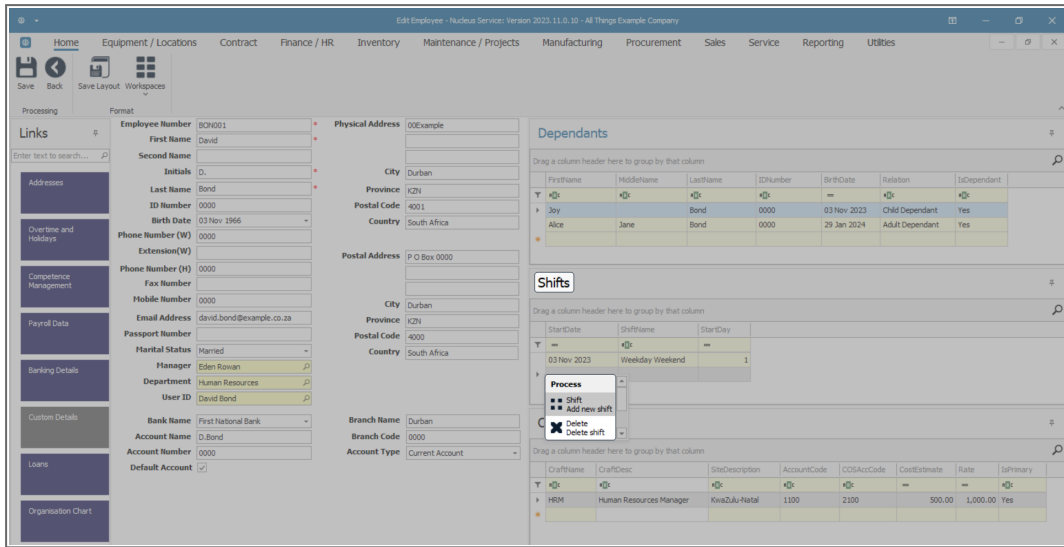
## THE SHIFTS PANEL

- In the **Shifts** frame, right click on any row (except the filter row).
- A **Process** menu will pop up.
- Select **Shifts - Add new shift** from the list.



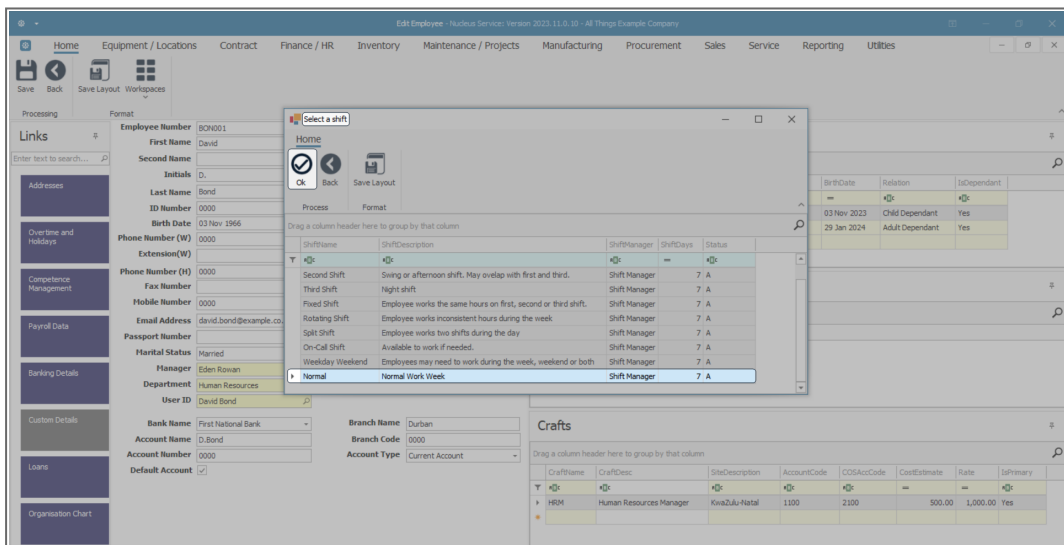
- Right click in any row (except the filter row) to display a pop-up **Process** menu.

- Click on **Shift** - Add new shift.



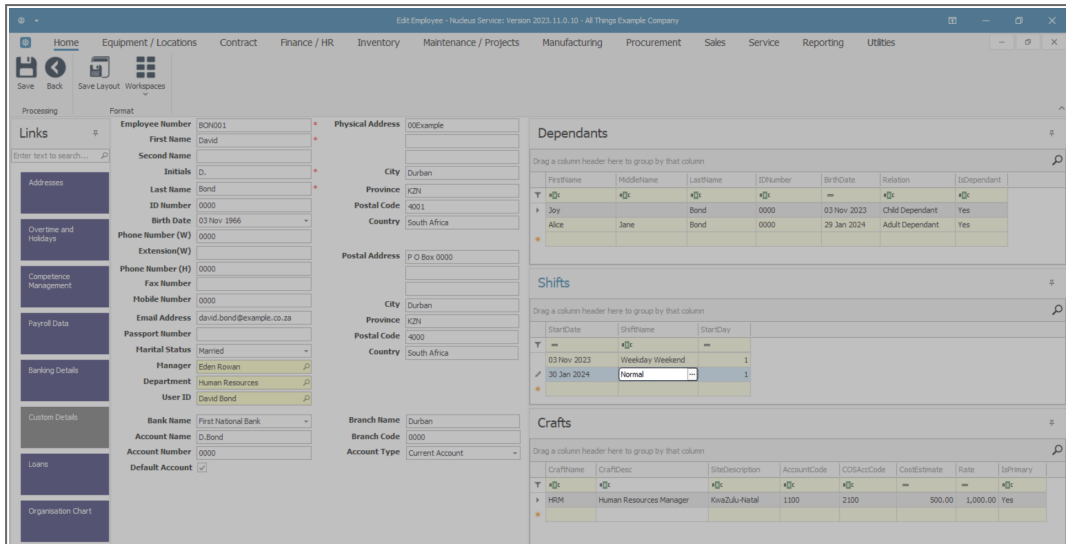
The **Select a shift** screen will be displayed.

- Click on the **row selector** in front of the **shift** you wish to assign to this employee.
- Click on **Ok**.



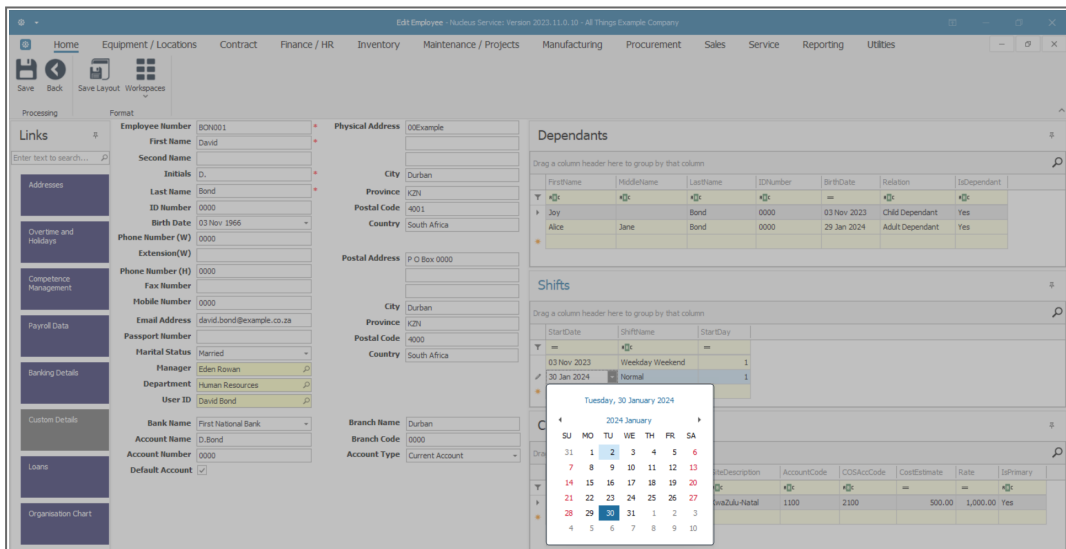
- The selected shift will now be displayed in the **Shift Name** column of the **Shifts** docking panel.



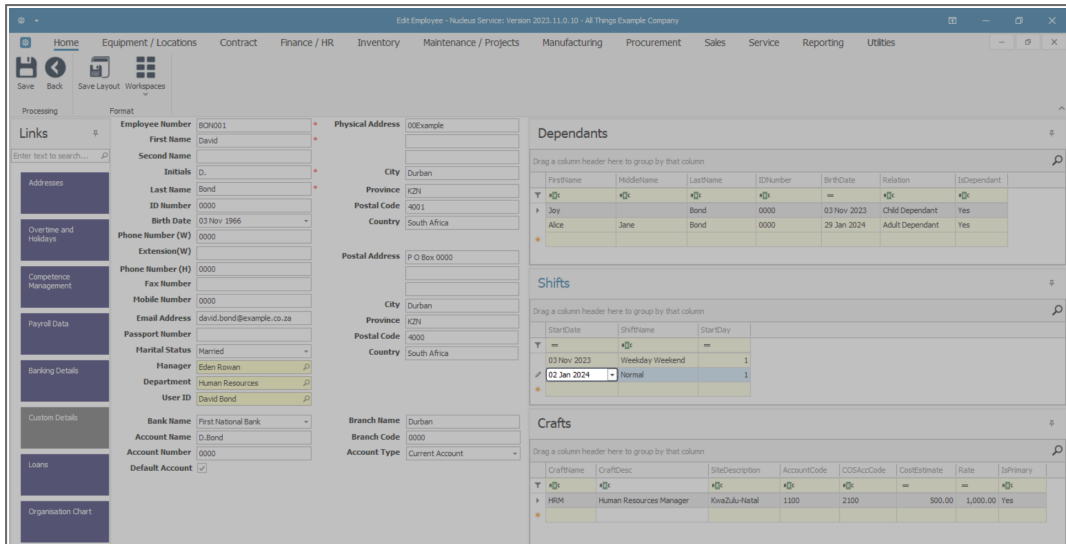


## SELECT START DATE

- The **Start Date** column will auto populate with the current date.
- Click on the **drop-down arrow** in the date field to display the **calendar**.
- Click on the correct **start date**.

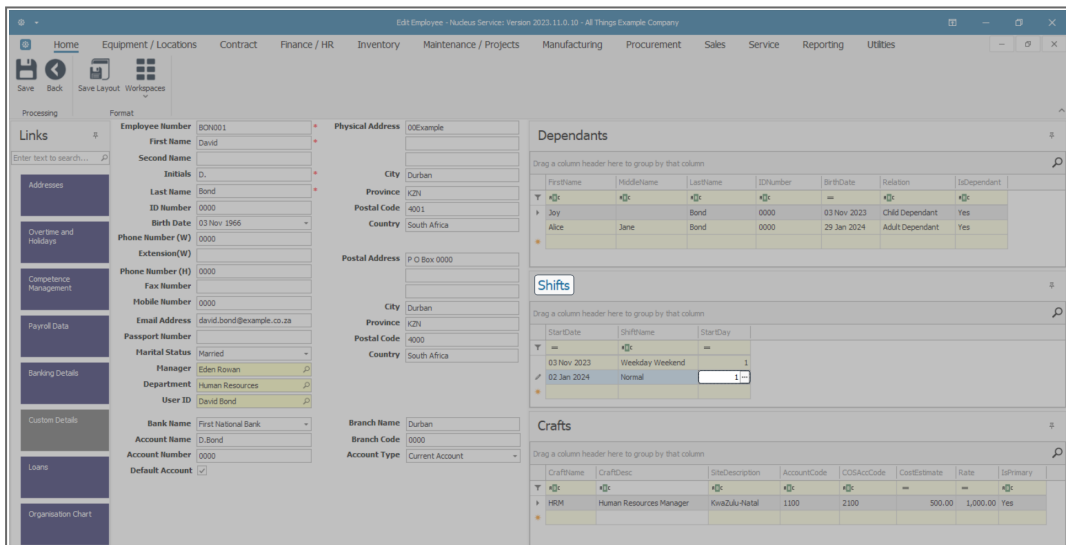


- The selected date will now be displayed in the **Start Date** column.



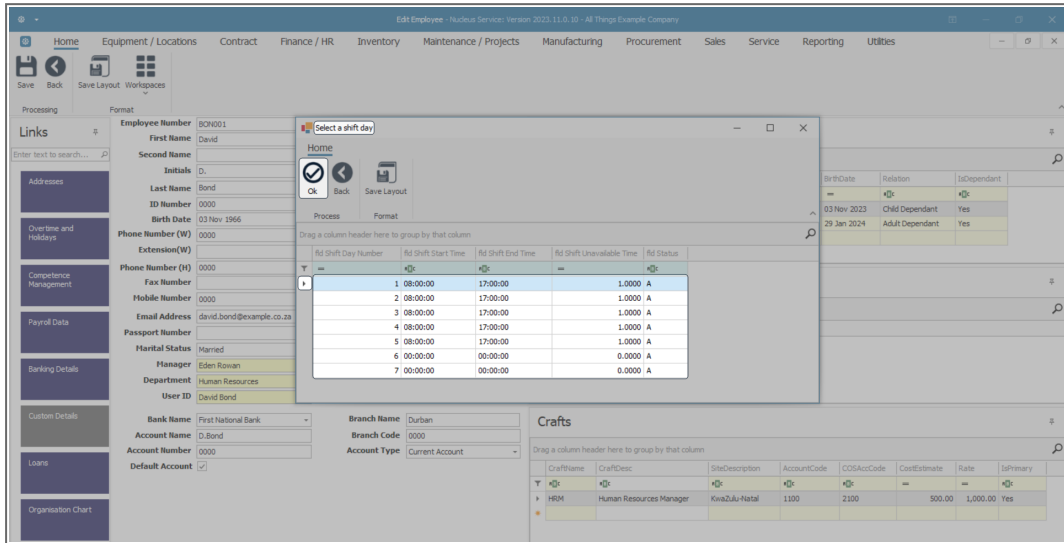
## SELECT START DAY

1. Scroll right in the Shifts panel to the **Start Day** column and click in this field.
2. An **ellipsis button** will be revealed, click on this button.



The **Select a shift day** look up screen will pop up.

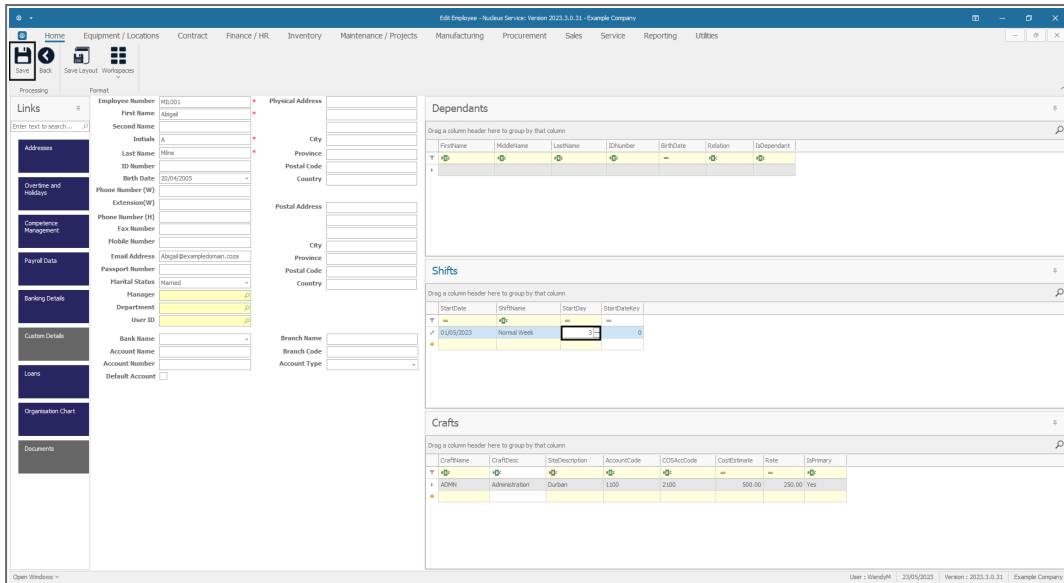
- Click on the **row selector** in front of the appropriate start day number: (Monday = **1**, Tuesday = **2**, Wednesday = **3**) etc.
- Click on **Ok**.



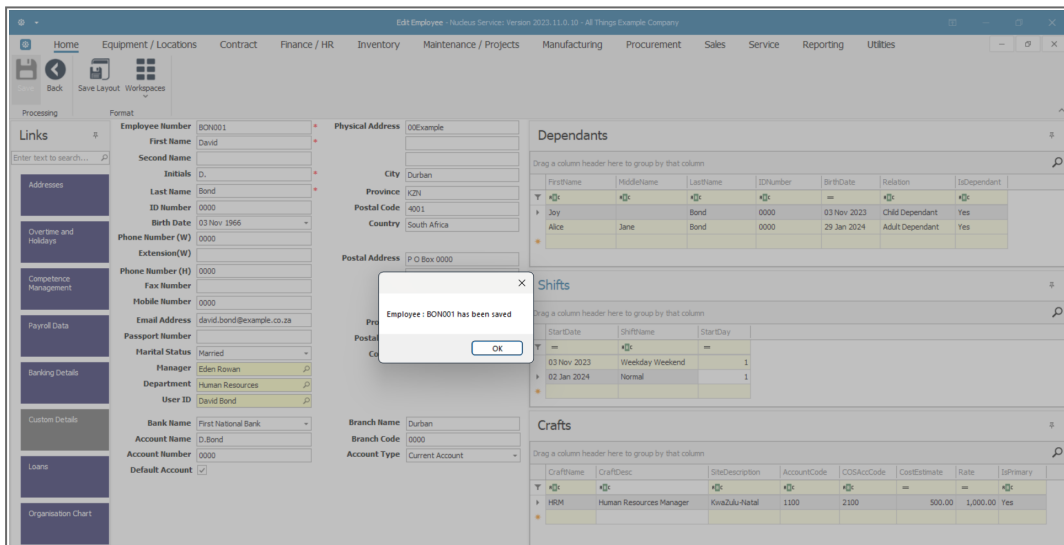
- The selected start day date will now be displayed in the **Start Day** column.

## SAVE SHIFT ASSIGNMENT

- When you have finished adding the shift details to this employee, click on **Save**.



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



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

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