

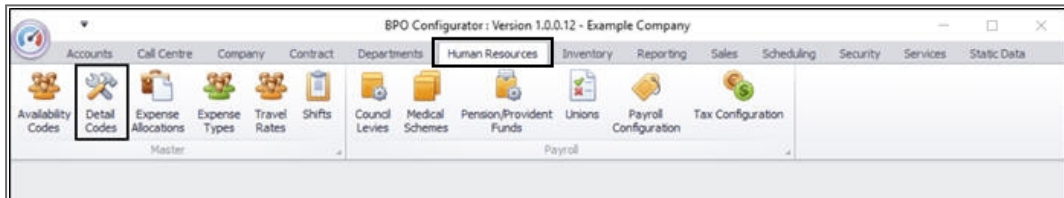
HUMAN RESOURCES

DETAIL CODES

Employee Detail Codes can be set up for details you wish to keep note of, but aren't listed within the system.

You can set up any employee detail codes that you require, e.g. Contract Start Date, Blood Type etc.

Ribbon Access: *Configurator > Human Resources > Detail Codes*



The **Detail Codes** screen will be displayed.

VIEW CURRENT DETAIL CODES

- Here you can view a data grid of all the **detail codes** currently on the system.

ADD DETAIL CODE

- Click in the **Employment Detail Code Grouping** text box in the **last row** of the data grid.

Detail Codes - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Delete Save Layout Workspaces Save Filter Refresh

EmployeeDetailCodeGrouping	EmployeeDetailCode	EmployeeDetailDescription	Status	SortOrder
MED	BLT	Blood Type	A	1
MED	MEAD	Medical Aid	A	2
PER	GEN	Gender	A	3
CON	TRA	Type of Retirement Annuity	A	4

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- This row will now be '*activated*'.
- You can now enter in the new *Employee Custom Detail* in this new row as required.
 - **Employee Detail Code Grouping:** Type in a *code* for this employee detail grouping.
 - **Employee Detail Code:** Type in an employee detail *code*.
 - **Employee Detail Description:** Type in an employee detail *description*.
 - **Status:** This will auto populate with **A** - Active.
 - **Sort Order:** Click in this text box and either type in or use the arrow indicators to select the *sort order* for this employee custom detail code.
- **Note:** The *sort order* is the order in which this will appear in the employee custom detail code drop-down list in BPO. If each employee custom detail code has the number **1**, then the drop-down list will usually default to an alphabetical order in BPO. If, for example, it is numbered **5**, in a numbered list, then it will appear **5th** in the drop-down list in BPO.

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SAVE DETAIL CODE

- When you have finished adding the new employee detail code details, press **Enter** on your keyboard.
- An **Update** message box will appear, asking;
 - ***Are you sure you want to save changes to this Detail Code?***
- Click on **Yes**.

EmployeeDetailCodeGrouping	EmployeeDetailCode	EmployeeDetailDescription	Status	SortOrder
MED	BLT	Blood Type	A	1
MED	MEAD	Medical Aid	A	2
PER	GEN	Gender	A	3
CON	TRA	Type of Retirement Annuity	A	4
ID	FID	Foreign Identity	A	5

Update

Are you sure you want to save changes to this Detail Code?

Yes No Cancel

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- The new employee detail code will be *saved* and a *new row* will be added the *Detail Codes* data grid.

Detail Codes - BPO Configurator : Version 1.0.0.12 - Example Company

Home Accounts Call Centre Company Contract Departments Human Resources Inventory Reporting Sales Scheduling Security Services Static Data

Delete Save Layout Workspaces Save Filter Refresh

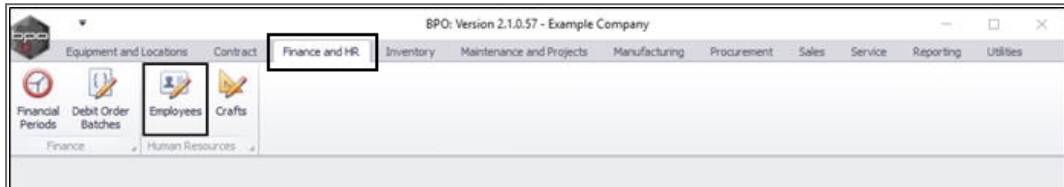
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VIEW DETAIL CODE IN BPO

- Now that we have added a **Detail Code** in the **Configurator**, let's see where we can view this information in **BPO**.

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



The **Employees** listing screen will be displayed.

- Click on the **row selector** in front of any **employee**.
 - In this image, **David Rowe** has been selected.
- Click on the **Custom Details** tile.

Employees - BPO: Version 2.1.0.57 - Example Company

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

Add Edit Delete View Save Layout Workspaces Reports Export Refresh

Maintenance Format View Cuz...

Links

Enter text to search...

Drag a column header here to group by that column

EmployeeNum...	FullName	EmailAddress	Manager
BAL001	Susan Cooper	susan@noemail.com	Belinda Sharman
BEN	Ben Johnson		
CO3	CO3 Administrator	judith.mudzengi@co3.co.za	
DAV01	David Rowe		
DUT001	Bianca Du Toit	bianca@co3.co.za	CO3 Administrator
DUT001	Test Employee		
DUT001	Mary Saunders		
DUT002	Tammy Du Toit		
DUT010	Gabi Surendorff	bianca@co3.co.za	
E987654	Jeff Rivers		
ED01	Ed Jones		
EMP123	Carolina Suzzetta Lourens van den Adendorf		Bianca Du Toit
HAR001	Chris Haynes Attendee		Bianca Du Toit
JAD01	Jade Rivers		Bianca Du Toit
JOE001	Joel James	joel@noemail.com	Bianca Du Toit
JCH001	Michael-Stark Johnson Stevenson Jones	mike@noemail.co.za	Markus Arilus Stevenson Roderhizer Tomljenovic
MIL001	Abigail Milne		
MUD001	Judith Mudzengi	judith.mudzengi@co3.co.za	Bianca Du Toit
RED001	George James Reddy Jefferson Rohrbaugh		Chris Haynes Attendee
SHA001	Belinda Sharman		Bianca Du Toit
STE001	Markus Arilus Stevenson Roderhizer Tomljenovic	judith.mudzengi@co3.co.za	Jonathan-Mark Twain-Sutton-under-Whitstonedcffe
TAD009	Theo Peterson	ted@noemail.co.za	Belinda Sharman
TIM	Joseph Timber		
TWA001	Jonathan-Mark Twain-Sutton-under-Whitstonedcffe	jons@noemail.co.za	Belinda Sharman
You001	Karlen Jessica Young Dunnaway Svenson		

Addresses

Overtime and Holidays

Competence Management

Payroll Data

Banking Details

Custom Details

Loans

Organisation Chart

Open Windows

09 May 2018

- The ***Custom Details for: []*** screen will be displayed.
- Here you can view a ***list*** of the ***correlating*** employee custom detail codes as set up in the ***Configurator***.
 - In this image, the newly added code ***Foreign Identity*** has been underlined.

Custom Details for : DAV01 - BPO; Version 2.1.0.57 - Example Company

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

Save Back Save Layout Workspaces Excel

Maintenance Format View

Drag a column header here to group by that column

EmployeeDetailCodeGrouping	EmployeeDetailCode	EmployeeDetailDescription	DetailData
CON	TRA	Type of Retirement Annuity	
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