

# HUMAN RESOURCES

## EMPLOYEES - CUSTOM DETAILS

In the **Custom Details** screen, you can view a list of Details Codes set up on the system, these can be configured, refer to [Employee Custom Detail Codes](#).

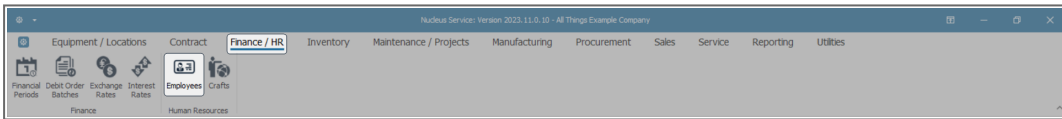
**Custom Details** can be set up to add information that you wish to keep note of but that is not default to the system, for example: an employee contract start and end date, or an employee's foreign identity document number.

You can only make changes in the **Detail Data** column in the data grid.

---

### Ribbon Access: Finance / HR Employees

---



The **Employees** listing screen will display.

## VIEW EMPLOYEE CUSTOM DETAILS

---

### SELECT EMPLOYEE

---

- Select the **row** of the employee whose custom details you wish to **view**.
- Click on the **Custom Details** tile in the **Links** panel.

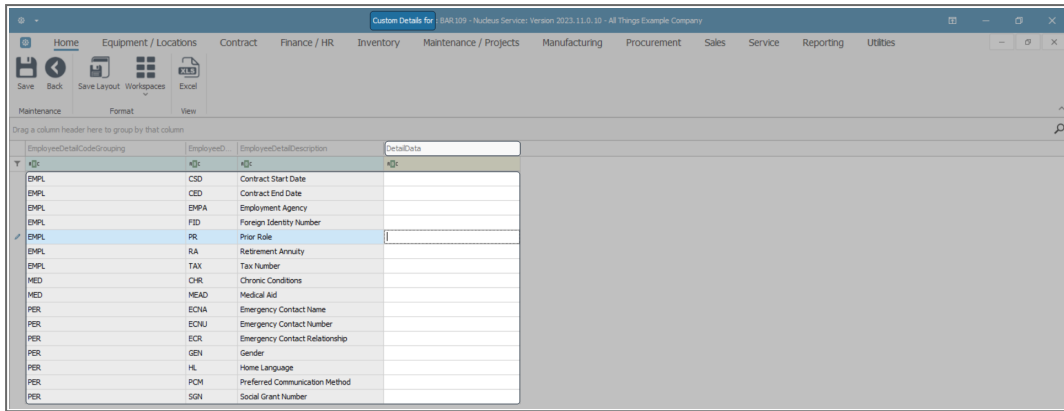
EmployeeID	EmployeeName	EmailAddress	Manager	DepartmentName
555	TOD954 Alaya Todd	alaya.todd@tattexampdomain.co.za	Phoebe McClan	Quality Assurance
623	LAN902 Alana Lang	alana.lang@tattexampdomain.co.za	Timothy Palacios	Stock Control
825	RCB989 Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofa Simmons	Sales
115	SHE536 Alanna Sheppard	alanna.sheppard@tattexampdomain.co.za	Dulce Nixon	Development
872	PER713 Alarc Perks	alarc.perks@tattexampdomain.co.za	Sofa Simmons	Sales
101	QUE261 Alaya Guerrero	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300	HEH531 Albert Henson	albert.henson@tattexampdomain.co.za	Harley Briggs	Quality Assurance
19	SN261 Aleena Singh	aleena.singh@tattexampdomain.co.za	Elanna Pugh	Human Resources
291	WAR246 Aleena Ware	aleena.ware@tattexampdomain.co.za	Rory Schroder	Marketing
400	BAR109 Alex Barron	alex.barron@tattexampdomain.co.za	Corbin McConnell	Administration
724	COL656 Alexander Coleman	alexander.coleman@tattexampdomain.co.za	Raman Simpson	Service Centre
287	SHE787 Alexandra Sheppard	alexandra.sheppard@tattexampdomain.co.za	Aislinn Clay	Maintenance
643	AGU269 Alexandria Aguirre	alexandria.aguirre@tattexampdomain.co.za	Timothy Palacios	0
559	DAU006 Alexandria Daugherty	alexandria.daugherty@tattexampdomain.co.za	Violeta Spence	Sales
179	HUY032 Alexandra Huynh	alexandria.huynh@tattexampdomain.co.za	Leslie Miles	Implementations
181	SAJ398 Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152	HOJ019 Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
940	BRAB79 Ala Branch	ala.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	FOX967 Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
869	CAMS34 Allison Camacho	allison.camacho@tattexampdomain.co.za	Sofa Simmons	Administration
175	ZAM565 Allison Zamora	allison.zamora@tattexampdomain.co.za	Leslie Miles	Engineering
239	EST969 Alie Estrada	alie.estrada@tattexampdomain.co.za	Averi Alvarado	Projects
481	CUE036 Allison Cuevas	allison.cuevas@tattexampdomain.co.za	Bella Chase	Contracts
463	BEN046 Alyson Bender	alysion.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51	DUR389 Alma Duran	alma.duran@tattexampdomain.co.za	Ansley Skinner	Sales
587	JAR933 Alma Jarvis	alma.jarvis@tattexampdomain.co.za	Lucy Knapp	Development

- The **Custom Details for : [ ]** screen will open where you can view the custom details linked to this employee.
- Pre-defined codes will be listed in this screen.

**Note:** If the custom detail code you wish to update is not in this list, then refer to [Employee Custom Detail Codes](#).

## ADD CUSTOM DETAIL DATA

- Select the **row** where you wish to **add** information.
- Type in the information you wish to add in the **Detail Data** column of that row.
- Note that you can only add information to the **Detail Data** column.

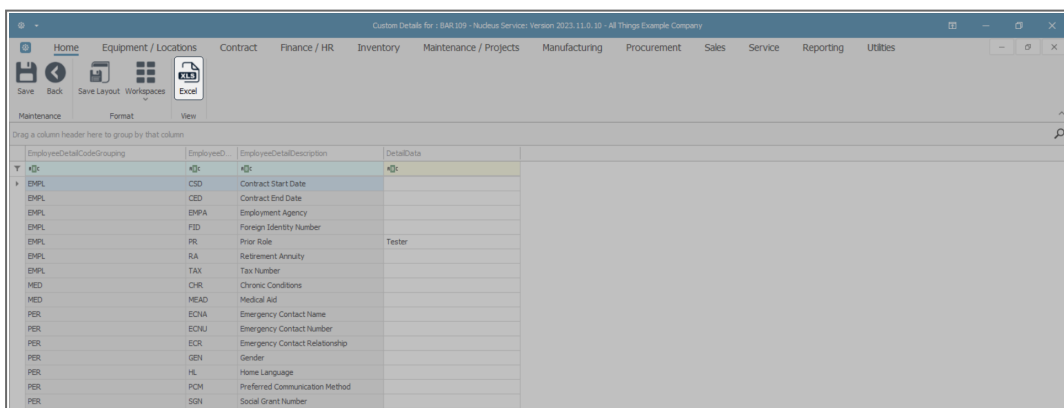


## SAVE CUSTOM DETAIL DATA

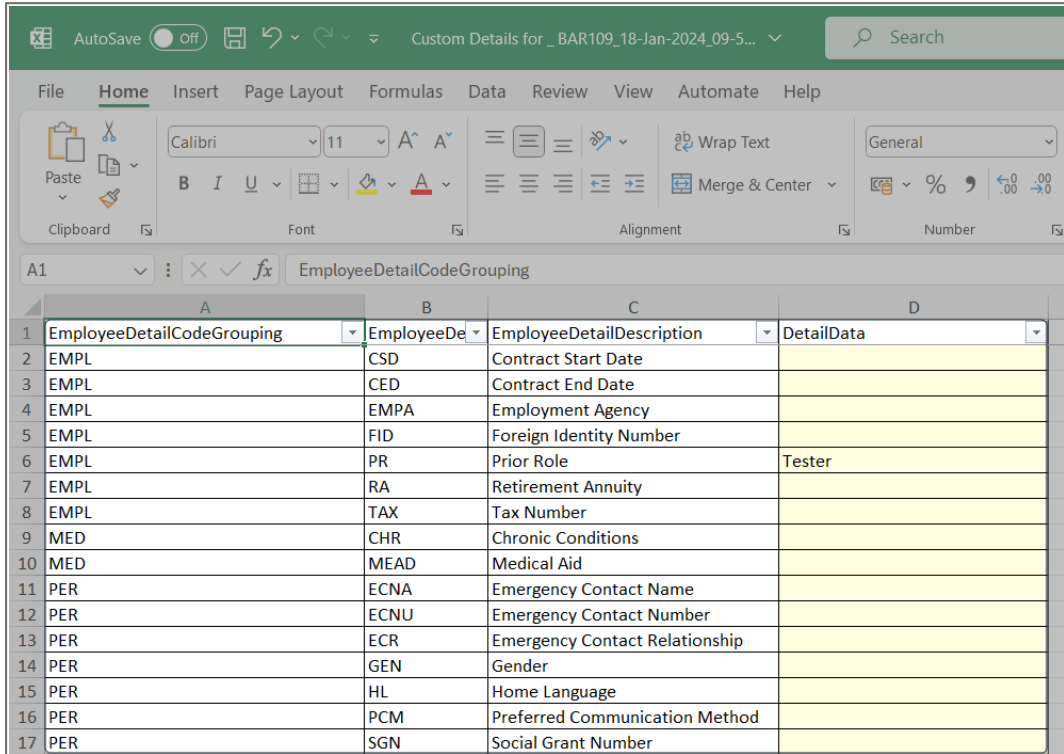
- When you have added the new details -
  - In this example, the **Prior Role** information has been typed in.
- Click on **Save**.
- The details will be saved, and you will return to the **Employees** listing screen.
- You may choose to export data to Excel, if required.

## EXPORT TO EXCEL

- In the **Custom Details for: [ ]** screen.
- Click on **Excel**.



- This will open an MS Excel spreadsheet with all the data from the data grid.
- You can choose to save, view, search for data, prepare it for printing, and so on, as required.



EmployeeDetailCodeGrouping	EmployeeDe	EmployeeDetailDescription	DetailData
EMPL	CSD	Contract Start Date	
EMPL	CED	Contract End Date	
EMPL	EMPA	Employment Agency	
EMPL	FID	Foreign Identity Number	
EMPL	PR	Prior Role	Tester
EMPL	RA	Retirement Annuity	
EMPL	TAX	Tax Number	
MED	CHR	Chronic Conditions	
MED	MEAD	Medical Aid	
PER	ECNA	Emergency Contact Name	
PER	ECNU	Emergency Contact Number	
PER	ECR	Emergency Contact Relationship	
PER	GEN	Gender	
PER	HL	Home Language	
PER	PCM	Preferred Communication Method	
PER	SGN	Social Grant Number	

## EDIT CUSTOM DETAIL DATA

### SELECT EMPLOYEE

- In the **Employees** listing screen.
- Select the **row** of the employee whose Custom Details you wish to **edit**.
- Click on the **Custom Details** tile in the **Links** panel.

ID	EmployeeID	FullName	EmailAddress	Manager	DepartmentName
555	TOD954	Alaya Todd	alaya.todd@texampledomain.co.za	Phoebe McClain	Quality Assurance
623	LAV902	Alana Lang	alana.lang@texampledomain.co.za	Timothy Palacios	Stock Control
825	ROB989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofa Simmons	Sales
115	SH636	Alenna Sheppard	alenna.sheppard@texampledomain.co.za	Dulce Nixon	Development
872	PER713	Alenic Perkins	alenic.perkins@texampledomain.co.za	Sofa Simmons	Sales
101	GUE261	Alaya Guerrero	alaya.guerrero@texampledomain.co.za	Dulce Nixon	Service Centre
300	HEI511	Albert Henson	albert.henson@texampledomain.co.za	Harley Briggs	Quality Assurance
19	SDI261	Aleena Singh	aleena.singh@texampledomain.co.za	Elanna Pugh	Human Resources
291	WAR246	Aleena Ware	aleena.ware@texampledomain.co.za	Rory Schneider	Marketing
400	BAR109	Alex Barron	alex.barron@texampledomain.co.za	Corbin McCannell	Administration
724	COL656	Alexander Coleman	alexander.coleman@texampledomain.co.za	Roman Simpson	Service Centre
287	SH6787	Alexandra Sheppard	alexandra.sheppard@texampledomain.co.za	Aislinn Clay	Maintenance
643	AGU269	Alexandria Aguirre	alexandria.aguirre@texampledomain.co.za	Timothy Palacios	0
559	DAU006	Alexandria Daugherty	alexandria.daugherty@texampledomain.co.za	Violeta Spence	Sales
179	HUY032	Alexandria Huyrh	alexandria.huyrh@texampledomain.co.za	Leslie Miles	Implementations
181	SAL398	Alexis Sales	alexis.sales@texampledomain.co.za	Leslie Miles	0
152	NGU219	Alfred Nguyen	alfred.nguyen@texampledomain.co.za	Dulce Nixon	Service Centre
346	BSA879	Alia Branch	alia.branch@texampledomain.co.za	Malaysia Price	Administration
3	FOX967	Alanna Fox	alanna.fox@texampledomain.co.za	Antonio Gordon	Accounts
869	CAM534	Allison Camacho	allison.camacho@texampledomain.co.za	Sofa Simmons	Administration
175	ZAM565	Allison Zamora	allison.zamora@texampledomain.co.za	Leslie Miles	Engineering
239	EST969	Alle Estrada	alle.estrada@texampledomain.co.za	Averi Alvarado	Projects
481	CUE036	Allison Cuevas	allison.cuevas@texampledomain.co.za	Bella Chase	Contracts
463	BEH946	Alyson Bender	alyson.bender@texampledomain.co.za	Zavier Patton	Service Centre
51	DUR589	Alma Duran	alma.duran@texampledomain.co.za	Anisley Skinner	Sales
587	JAR933	Alma Jarvis	alma.jarvis@texampledomain.co.za	Lucy Knapp	Development

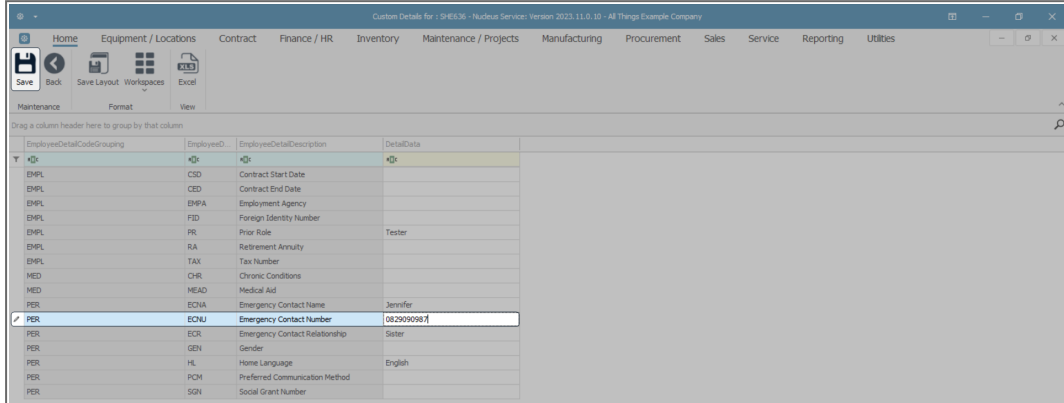
## SELECT CUSTOM DETAILS TO EDIT

- The **Custom Details for : [ ]** screen will open.
- Edit the information you wish to change in the **Detail Data** column of that row.  
You can either backspace or highlight over the existing information and type in the new information.
- In this example, the **emergency contact number** is to be amended.

EmployeeDetailCodeGrouping	EmployeeID	EmployeeDetailDescription	DetailData
EMPL	CSD	Contract Start Date	
EMPL	CED	Contract End Date	
EMPL	EMPA	Employment Agency	
EMPL	FIID	Foreign Identity Number	
EMPL	PR	Prior Role	Tester
EMPL	RA	Retirement Annuity	
EMPL	TAX	Tax Number	
MED	CHR	Chronic Conditions	
MED	MEAD	Medical Aid	
PER	ECNA	Emergency Contact Name	Jennifer
PER	ECNU	Emergency Contact Number	0115192570
PER	ECR	Emergency Contact Relationship	Sister
PER	GEN	Gender	
PER	HL	Home Language	English
PER	PCM	Preferred Communication Method	
PER	SGN	Social Grant Number	

## SAVE CUSTOM DETAIL EDITS

- When you are happy with your changes -
- Click on **Save**.



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

## DELETE CUSTOM DETAILS DATA

### SELECT EMPLOYEE

- In the **Employees** listing screen.
- Select the **row** of the employee for whom you wish to **delete** Custom Detail information.
- Click on the **Custom Details** tile in the **Links** panel.

EmployeeID	FullName	EmailAddress	Manager	DepartmentName
555	Alaya Todd	alaya.todd@attexampdomain.co.za	Phoebe McClan	Quality Assurance
623	Alana Lang	alana.lang@attexampdomain.co.za	Timothy Palacos	Stock Control
825	Alanna Robertson	alanna.robertson@attexampdomain.co.za	Sofa Simmons	Sales
115	Alanna Sheppard	alanna.sheppard@attexampdomain.co.za	Dulce Nixon	Development
872	Alicia Perkins	alicia.perkins@attexampdomain.co.za	Sofa Simmons	Sales
303	Alisa Guerrero	alisa.guerrero@attexampdomain.co.za	Dulce Nixon	Service Centre
300	Albert Henson	albert.henson@attexampdomain.co.za	Harley Biggs	Quality Assurance
19	Aleena Singh	aleena.singh@attexampdomain.co.za	Elanna Pugh	Human Resources
291	Aleena Ware	aleena.ware@attexampdomain.co.za	Rory Schroeder	Marketing
400	Alex Barron	alex.barron@attexampdomain.co.za	Corbin McConnell	Administration
724	Alexander Coleman	alexander.coleman@attexampdomain.co.za	Roman Simpson	Service Centre
287	Alexandra Sheppard	alexandra.sheppard@attexampdomain.co.za	Aislinn Clay	Maintenance
643	Alexandria Aguirre	alexandria.aguirre@attexampdomain.co.za	Timothy Palacos	0
559	Alexandria Daugherty	alexandria.daugherty@attexampdomain.co.za	Violeta Spence	Sales
179	Alexandria Huynh	alexandria.huynh@attexampdomain.co.za	Leslie Miles	Implementations
181	Alexis Salas	alexis.salas@attexampdomain.co.za	Leslie Miles	0
152	Alfred Nguyen	alfred.nguyen@attexampdomain.co.za	Dulce Nixon	Service Centre
940	Alia Branch	alia.branch@attexampdomain.co.za	Malaysia Price	Administration
3	Alanna Fox	alanna.fox@attexampdomain.co.za	Antonio Gordon	Accounts
869	Allison Camacho	allison.camacho@attexampdomain.co.za	Sofa Simmons	Administration
175	Allison Zamora	allison.zamora@attexampdomain.co.za	Leslie Miles	Engineering
239	Allie Estrada	allie.estrada@attexampdomain.co.za	Averi Alvarado	Projects
481	Allison Cuevas	allison.cuevas@attexampdomain.co.za	Bella Chase	Contracts
463	Allyson Bender	allyson.bender@attexampdomain.co.za	Zavier Patton	Service Centre
51	Alma Duran	alma.duran@attexampdomain.co.za	Anslley Skinner	Sales
587	Alma Jarvis	alma.jarvis@attexampdomain.co.za	Lucy Knapp	Development

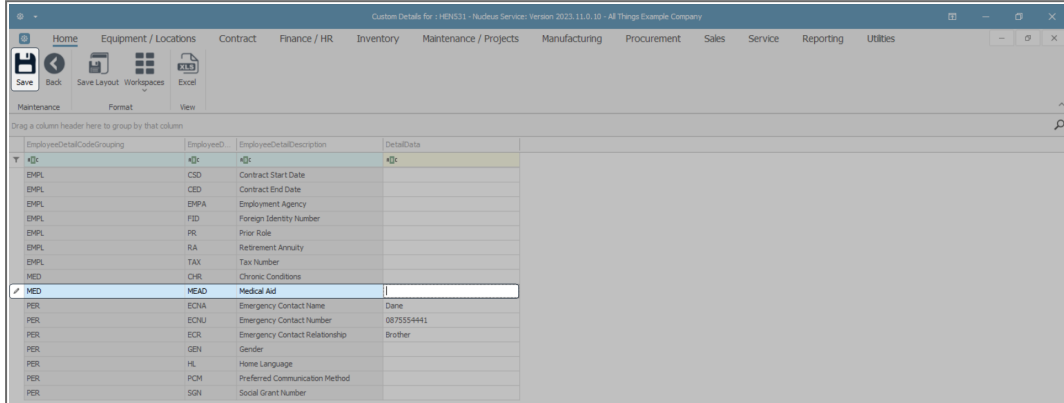
## SELECT CUSTOM DETAILS TO DELETE

- The **Custom Details for : [ ]** screen will open.
- Delete the required information in the **Detail Data** column of that row.  
You can either backspace or highlight over the existing information and press Delete on your keyboard.
- In this example, the **Medical Aid Detail Data** will be deleted.

EmployeeDetailCodeGrouping	EmployeeID	EmployeeDetailDescription	DetailData
ENPL	CEI	Contract Start Date	
ENPL	CEI	Contract End Date	
ENPL	EMPA	Employment Agency	
ENPL	FID	Foreign Identity Number	
ENPL	PR	Prior Role	
ENPL	RA	Retirement Annuity	
ENPL	TAX	Tax Number	
MED	CHR	Chronic Conditions	
MED	MEAD	Medical Aid	00000000
PER	EDIA	Emergency Contact Name	Diane
PER	EDIN	Emergency Contact Number	0875554441
PER	ECR	Emergency Contact Relationship	Brother
PER	GEN	Gender	
PER	HL	Home Language	
PER	PCM	Preferred Communication Method	
PER	SGN	Social Grant Number	

## SAVE DELETION

- When you are happy with your deletions -
- Click on **Save**.



- The deletion will be saved, and you will return to the **Employees** listing screen.

MNU.021.004