

# 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](#).

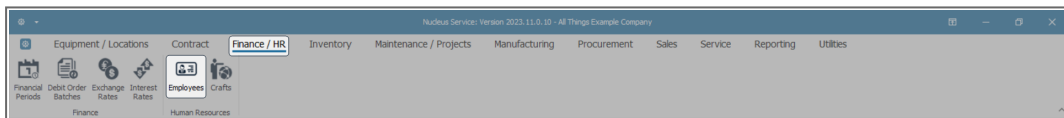
**Custom Details** can be set up to add information that you wish to keep note of but that is not default to the system, for example: an employee contract start and end date, or an employee's foreign identity document number.

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

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### Ribbon Access: Finance / HR Employees

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The **Employees** listing screen will display.

## VIEW EMPLOYEE CUSTOM DETAILS

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### SELECT EMPLOYEE

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

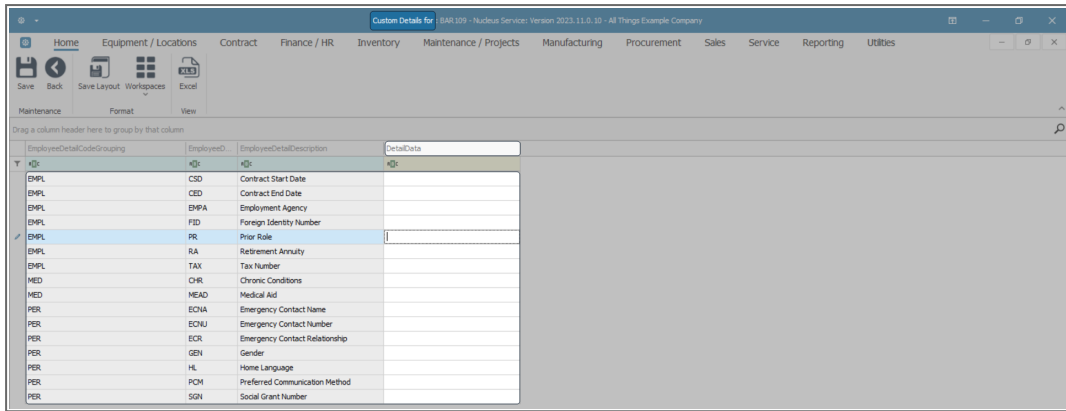
EmployeeID	EmployeeName	EmailAddress	Manager	DepartmentName
555	TOD954 Alaya Todd	alaya.todd@tattexampdomain.co.za	Phoebe McClan	Quality Assurance
623	LAN902 Alana Lang	alana.lang@tattexampdomain.co.za	Timothy Palacios	Stock Control
825	RCB989 Alanna Robertson	alanna.robertson@tattexampdomain.co.za	Sofia Simmons	Sales
115	SHE536 Alanna Sheppard	alanna.sheppard@tattexampdomain.co.za	Dulce Nixon	Development
872	PER713 Alaric Perkins	alaric.perkins@tattexampdomain.co.za	Sofia Simmons	Sales
101	QUE261 Alaya Guerrero	alaya.guerrero@tattexampdomain.co.za	Dulce Nixon	Service Centre
300	HEB531 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 Schneider	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	SA139 Alexis Salas	alexis.salas@tattexampdomain.co.za	Leslie Miles	0
152	NGU019 Alfred Nguyen	alfred.nguyen@tattexampdomain.co.za	Dulce Nixon	Service Centre
940	BRN870 Ala Branch	ala.branch@tattexampdomain.co.za	Malaysia Price	Administration
3	FOX967 Alanna Fox	alanna.fox@tattexampdomain.co.za	Antonio Gordon	Accounts
869	CAM534 Allison Camacho	allison.camacho@tattexampdomain.co.za	Sofia 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	alison.bender@tattexampdomain.co.za	Zavier Patton	Service Centre
51	DUR389 Alma Duran	alma.duran@tattexampdomain.co.za	Anslay 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.

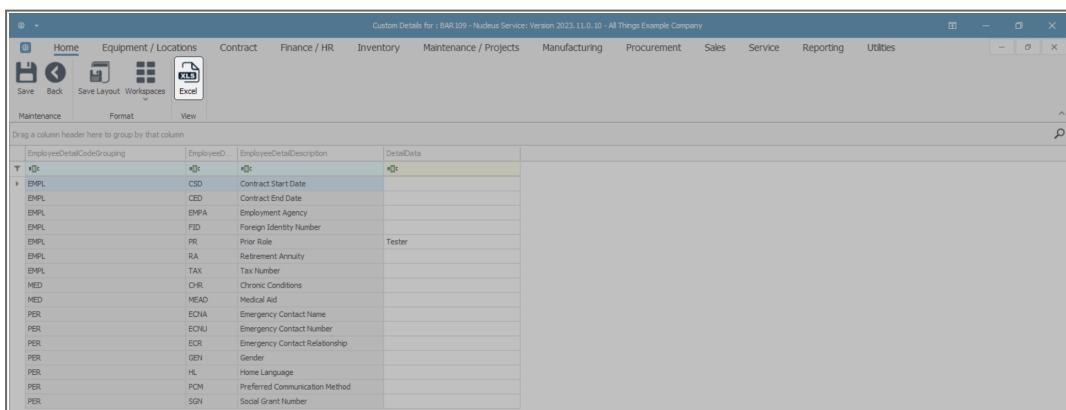


## SAVE CUSTOM DETAIL DATA

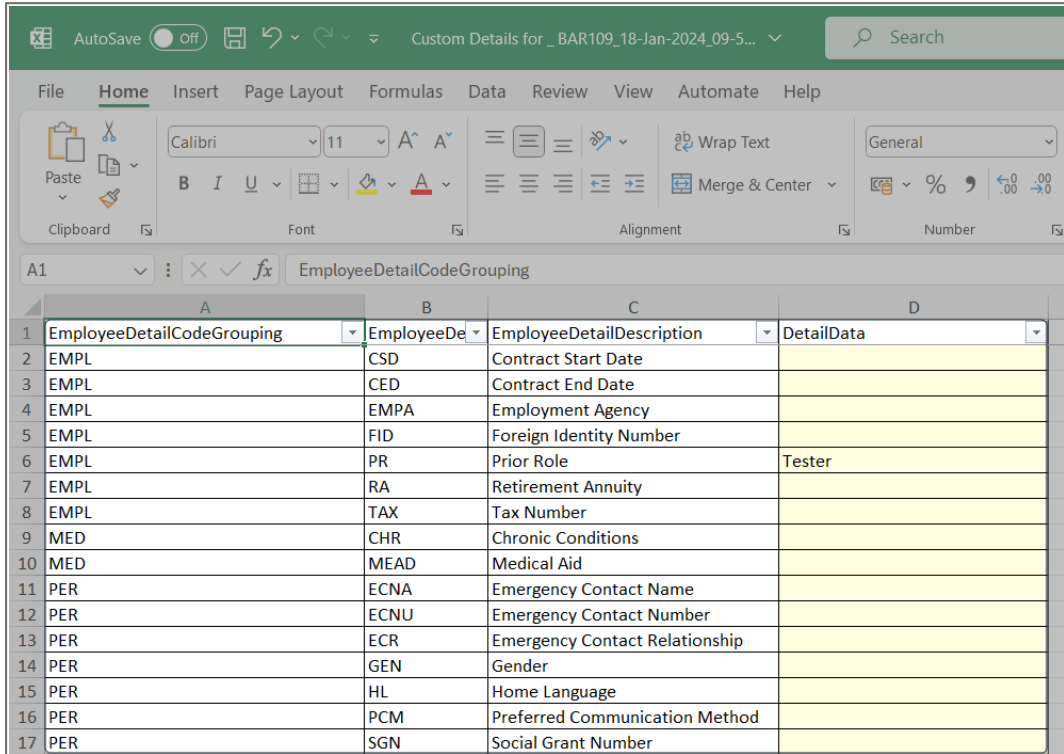
- When you have added the new details -
  - In this example, the **Prior Role** information has been typed in.
- Click on **Save**.
- The details will be saved, and you will return to the **Employees** listing screen.
- You may choose to export data to Excel, if required.

## 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.

EmployeeID	Full Name	Email Address	Manager	Department Name
555 TOD954	Alaya Todd	alaya.todd@texampledomain.co.za	Phoebe McClain	Quality Assurance
623 LAN902	Alana Lang	alana.lang@texampledomain.co.za	Timothy Palacios	Stock Control
825 ROB989	Alanna Robertson	alanna.robertson@texampledomain.co.za	Sofa Simmons	Sales
115 SHE636	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 HEN151	Albert Henson	albert.henson@texampledomain.co.za	Harley Briggs	Quality Assurance
19 SNI261	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 SHE787	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 HUJ032	Alexandria Huynh	alexandria.huynh@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 BRB879	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

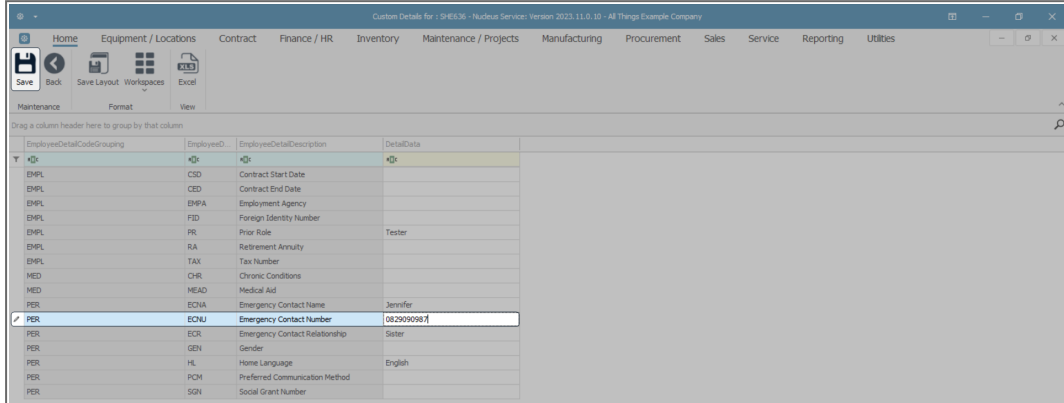
## SELECT CUSTOM DETAILS TO EDIT

- 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	Full Name	Email Address	Manager	Department Name
555	TOD964 Alaya Todd	alaya.todd@attexampdomain.co.za	Phoebe McClan	Quality Assurance
623	LAN902 Alana Lang	alana.lang@attexampdomain.co.za	Timothy Palacios	Stock Control
825	RCB989 Alanna Robertson	alanna.robertson@attexampdomain.co.za	Sofia Simmons	Sales
115	SHE536 Alanna Sheppard	alanna.sheppard@attexampdomain.co.za	Dulce Nixon	Development
872	PER 713 Alarc Perkins	alarc.perkins@attexampdomain.co.za	Sofia Simmons	Sales
303	GU6291 Alaya Guerrero	alaya.guerrero@attexampdomain.co.za	Dulce Nixon	Service Centre
300	HE1531 Albert Henson	albert.henson@attexampdomain.co.za	Harley Biggs	Quality Assurance
19	SD1251 Alena Singh	alena.singh@attexampdomain.co.za	Elanna Pugh	Human Resources
291	WAR246 Alena Ware	alena.ware@attexampdomain.co.za	Rory Schroeder	Marketing
400	BAR109 Alex Barron	alex.barron@attexampdomain.co.za	Corbin McConnell	Administration
724	COL656 Alexander Coleman	alexander.coleman@attexampdomain.co.za	Roman Simpson	Service Centre
287	SHE787 Alexandra Sheppard	alexandra.sheppard@attexampdomain.co.za	Aislinn Clay	Maintenance
643	AGU269 Alexandria Aguirre	alexandria.aguirre@attexampdomain.co.za	Timothy Palacios	0
559	DAU006 Alexandria Daugherty	alexandria.daugherty@attexampdomain.co.za	Violeta Spence	Sales
179	HUY032 Alexandra Huynh	alexandra.huynh@attexampdomain.co.za	Leslie Miles	Implementations
181	SAL 398 Alexis Salas	alexis.salas@attexampdomain.co.za	Leslie Miles	0
152	NGU219 Alfred Nguyen	alfred.nguyen@attexampdomain.co.za	Dulce Nixon	Service Centre
940	BSA870 Ala Branch	ala.branch@attexampdomain.co.za	Malaysia Price	Administration
3	FOX967 Alanna Fox	alanna.fox@attexampdomain.co.za	Antonio Gordon	Accounts
869	CAM534 Allison Camacho	allison.camacho@attexampdomain.co.za	Sofia Simmons	Administration
175	ZAM565 Allison Zamora	allison.zamora@attexampdomain.co.za	Leslie Miles	Engineering
239	EST969 Alle Estrada	alle.estrada@attexampdomain.co.za	Averi Alvarado	Projects
481	CUE036 Allison Cuevas	allison.cuevas@attexampdomain.co.za	Bella Chase	Contracts
463	BEN946 Alyson Bender	alyson.bender@attexampdomain.co.za	Zavier Patton	Service Centre
51	DUR389 Alma Duran	alma.duran@attexampdomain.co.za	Anslley Skinner	Sales
587	JAR933 Alma Jarvis	alma.jarvis@attexampdomain.co.za	Lucy Knapp	Development

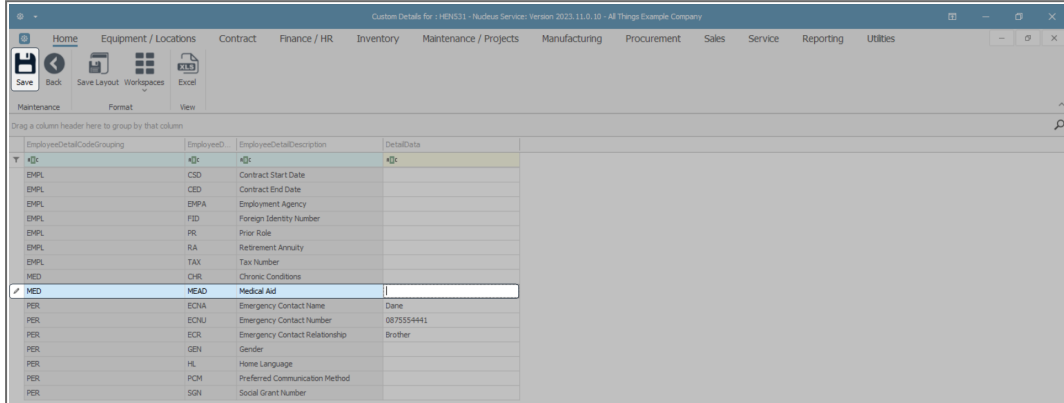
## SELECT CUSTOM DETAILS TO DELETE

- 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	CEO	Contract Start Date	
ENPL	CEO	Contract End Date	
ENPL	EMP	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	Insurance
PER	EDNA	Emergency Contact Name	Diane
PER	EDCN	Emergency Contact Number	0875554441
PER	ECLR	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.

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