

5 User Defined Forms

There is some specific information required by the University which is not held within the standard forms. To enable this specific information to be recorded within Trent, use has been made of the feature "User defined forms." Users can access the information held in User Defined Forms at both personal and position level. Some of this information is used only for the Roll of the Regent House, or by certain members of the contract teams.

1.1 Accessing people information in User Defined Forms

- 1. Search for the person for whom you wish to view user defined forms information.
- 2. With their record highlighted select the User Defined Forms menu





3. Select UDF Categories (People) to display the list of UDFs

UDF category	No. of rows
🧇 Clinical Seniority	0
🇐 College Membership	0
🇐 Contract Sent	0
🎯 DP Amalgamation	0
🎯 GMC Registration no	0
🧐 Name for Roll of Regent House	0
🎯 Overpayment Awaiting Recovery	0
🧐 Pay & Grading autoincrement protection	0
🎯 Payroll URN	1
🎯 Pension History Details	2
🎯 Personal Data Verification	0
🎯 Personal Faculty Membership	0
🎯 Personal Roll Details	1
🎯 Red circle status	0
🧐 Removal Expenses Eligibility	0
Expand/Collapse folders	
UDF Categories (9) UDF Details (People)	

4. In the column headed "No. of rows", a 1 indicates that a record is held. To view details select the row – in this example Personal Roll Details, select UDF Details (People)





5. The details will be displayed.





1.2 Searching by UDF

A search for UDF details can be performed by making use of the Advanced Search facility.

Navigate: Organisation > People > Advanced Search

♠)Org	janisat	tion	: Uni	versity of Can	nbridge People	
Searce	h O s	mart	gro	ups	Advanced	$\mathbf{)}$
		Surn	ame		• •	
Name Ur	nit Job	title	Sex	Date of birth	Social security no.	Pe

1. Scroll to the top of the list to see UDF (the list is not alphabetical)

dvanced Search:	
-Search suggestions Using the conditions search taking a long	CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the time.
-Criteria	Build special criteria 🗖
Surname UDF >	
Surname Forename Organisation unit Include lower levels Job title	
Sex Date of birth Social security number Starting date	▼

2. Select UDF as the criteria to search by



vance	a Search:
Search	i suggestions
	Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time.
Criteria	Build special criteria 🗖
UDF >	Click for subfields Is Is In
Output	options
	Generate batch 🗖
	Save as smart group 🗖

3. Click the drop down arrow to the right of the "UDF > Click for subfields box"

Advanced Search:	
Search suggestions Using the conditions CONTAIN, taking a long time.	DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search
- Criteria	Build special criteria 🗖
UDF > Click for subfields UDF > Click for subfields Removal Expenses Eligibility >	
Red circle status > Personal Roll Details > Personal Faculty Membership > Revroll LIRN >	
Pay & Grading autoincrement protection > Name for Roll of Regent House > GMC Registration no >	
DP Amalgamation > Contract Sent > College Membership >	

4. Select the UDF you wish to search by (In this example Red circle status)



dvanced Search:	
-Search suggestion:	3
😲 Using taking	the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search a long time.
-Criteria	
	Build special criteria 🗖
Red circle status	> Click for subfields is - +
-Output options	
Generate ba	atch 🗖
Save as sm	art group 🗖
⊙ For Tre	nt C For export
Output options Generate ba Save as sm ⊙ For Tree	itch □ art group □ nt © For export

5. Click the drop down arrow to the right of the "Click for subfields" field for the UDF you have chosen

Advanced Search:
Search suggestions — Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time.
Criteria Build special criteria Red circle status > Click for subfields Red circle status > Click for subfields Status Date start Date end Personal Roll Details > Personal Faculty Membership > Pay & Grading autoincrement protection > Name for Roll of Regent House > GMC Registration no > DP Amalgamation > Contract Sent >



6. Select the required subfield and complete the criteria for the search

dvanced Search:				
Search suggestions Using the condition taking a long time	ns CONTAIN, DO	DES NOT CONTAIN, LIK	E, and NOT LIKE may re	sult in the search
- Criteria		Build special criteria []	
Status		True	•	-+
-Output options				
Generate batch 🗖	1			
• For Trent O For ex	port			
	Ν	Search		

7. Click on the search button to start the search.



P & G Auto increment protection search is a similar process the last screen should display as below

Advanced Search:	
Search suggestions -	Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may res
Criteria	Build special criteria
Output options	
Sav	e as smart group
	Search

Headships, Occupancy Maintenance & UDFs



DP Amalgamation is slightly different as this is a value between 1 - 5 rather than a true value. For this search enter the following criteria on the final screen.

Advanced Search:
Search suggestions Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time.
Criteria
Build special criteria 🗖
No. of Points is lower than 6
Output options
Generate batch 🗖
Save as smart group 🗖
● For Trent ○ For export □