

4 Setting up a new Student person record

1. Select the University of Cambridge Organisation
2. Select the People menu item from the Action Pane
3. Check whether the person already exists.

Enter the surname of the new person to be created and click on 

If there are already people on Trent with this surname they will be listed by Unit and Job title. Identify using initials, date of birth, NI number, and if they exist abort adding and check the details provided agree with the details already recorded.

If the person is not found by surname, perform another search by NI number to establish they are not already added.

4. If the person is not found by surname, perform another search by date of birth to establish they are not already added.

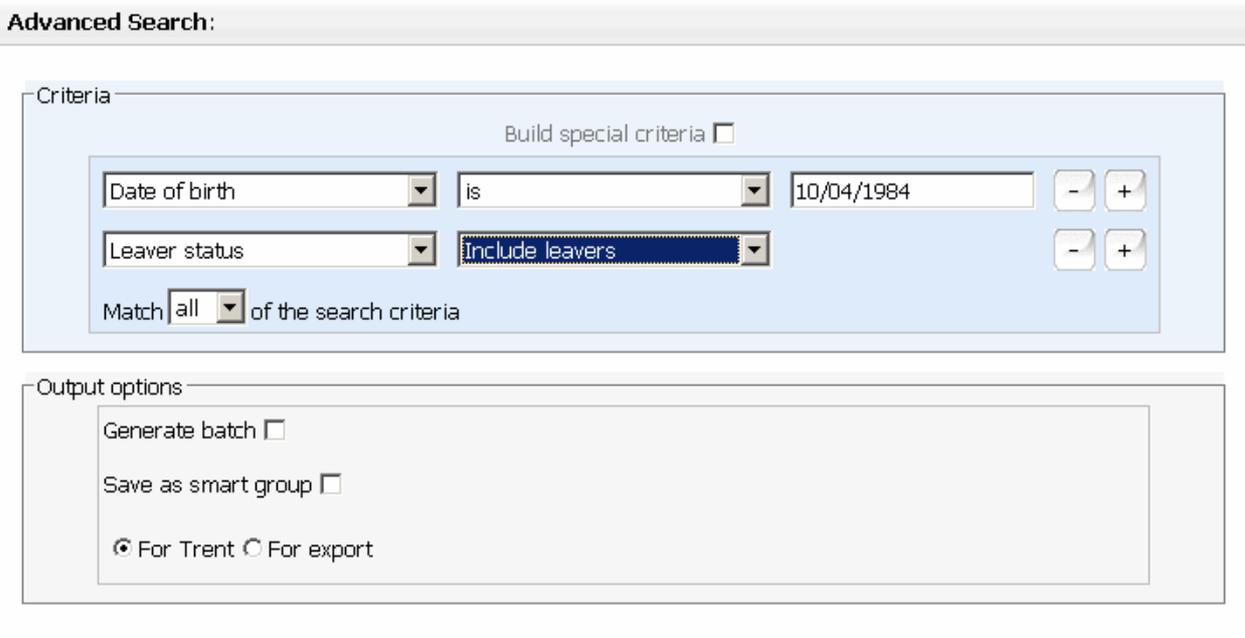
Remember if you use the advanced search, for instance to perform a search by date of birth, you must select "include leavers".



Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal
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Click on the Advanced button

Enter the first criteria – in this example date of birth of the new person to be created and click on  to enable you to enter additional criteria. Click the drop down arrow and choose leaver status and select include leavers.



Advanced Search:

Criteria

Build special criteria

Date of birth is 10/04/1984 - +

Leaver status include leavers - +

Match all of the search criteria

Output options

Generate batch

Save as smart group

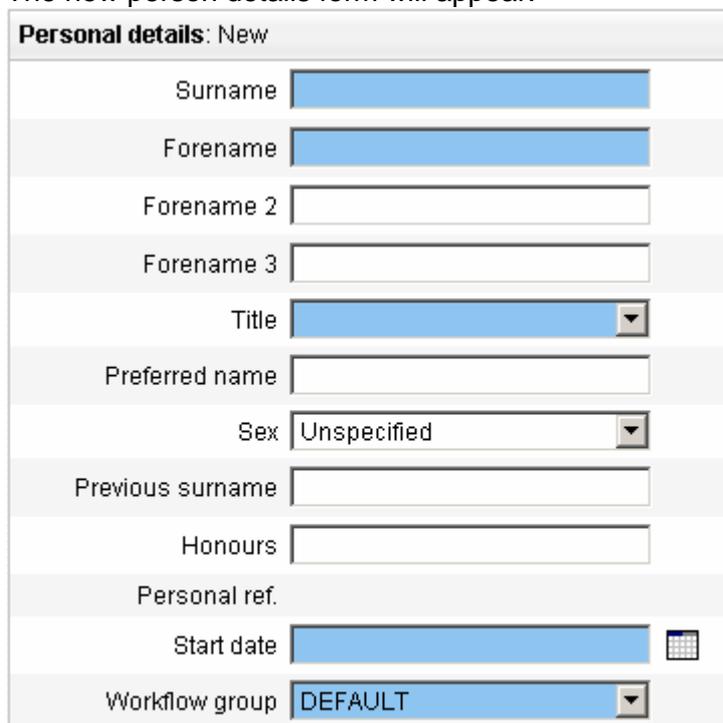
For Trent For export

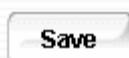
Search

5. Click on the  button

If the person does not already exist on the system, continue to step 6.

6. Select  **New - Personal details** menu from the Action Pane. The new person details form will appear.





7. Key in the surname, first name, first name 2, first name 3 if applicable.
8. Click the drop down list arrow and select a title.
9. Enter sex, and organisation start date. Leave workflow group to Default.
10. Click the  button
The record will be saved and the new person's details will be displayed in the object pane.
11. A personal reference number is automatically generated by Trent when a new person record is created. To enable you to easily identify this person to input person related information it is advised that you make a note of the personal reference number once you have added them. There is a "Personnel use only" section on page 2 of the CHRIS/30 form on which to do this.

4.1 Key Date Details

1. Select  **Key date details** from the Action Pane
The key date details form will be displayed
2. Enter Date of Birth, but DO NOT enter a retirement date or a reckonable service date.
3. Click the  button.

