


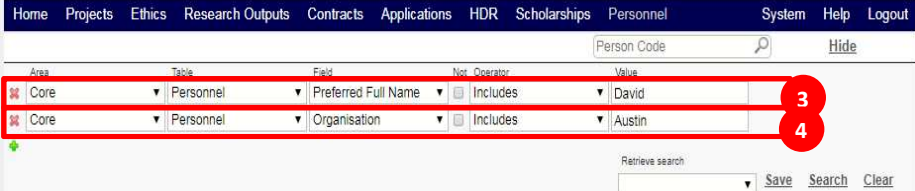


External Person Details



This guide shows users of Research Master how to create external person details within RME6. These records may be in the form of an external examiner, or an external researcher/investigator.

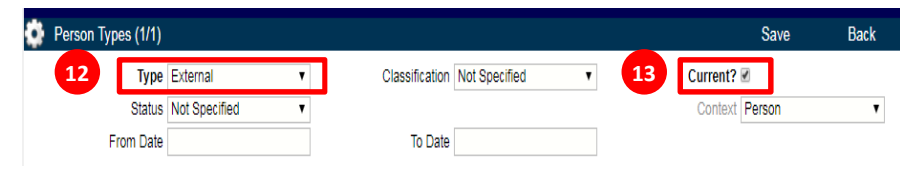
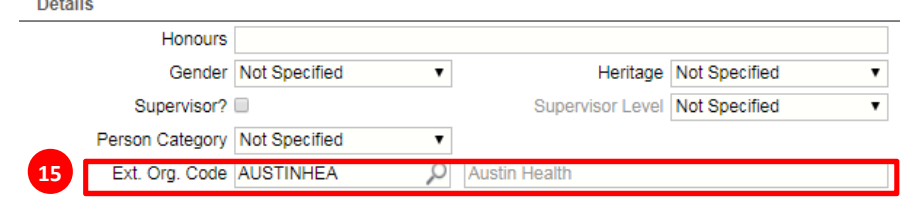
To check if an external supervisor / examiner's details already exist

<p>1. From the home screen, select Personnel and then select Personnel again from the top menu and drop down list</p>																																											
<p>2. Select the Advanced Search Function <i>(at the top of the screen)</i></p>																																											
<p>3. Enter the first search criteria as follows</p> <p>Area: Core Table: Personnel Field: Preferred Full Name (or any name field) Operator: Equal To Value: "Name" you are searching for</p> <p>4. Click on the Add Criteria icon  to enter another search criteria as follows:</p> <p>Area: Core Table: Personnel Field: Organisation Operator: Includes Value: Any part of the organisation name (if know)</p>	 <p>Personnel (6)</p> <table border="1" data-bbox="1122 1027 2033 1251"> <thead> <tr> <th>Person Code</th> <th>Preferred Full Name</th> <th>Staff ID</th> <th>Current?</th> <th>Student ID</th> <th>Person Type</th> </tr> </thead> <tbody> <tr> <td>0000239273</td> <td>David Thomas</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> <tr> <td>0000282530</td> <td>David McD Taylor</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> <tr> <td>BERLOWDJ-1</td> <td>David J. Berlowitz</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> <tr> <td>HARED-1</td> <td>David L Hare</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> <tr> <td>STORYD-1</td> <td>Dr David Story</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> <tr> <td>TAYLORD-1</td> <td>David Taylor</td> <td></td> <td><input checked="" type="checkbox"/></td> <td></td> <td>External</td> </tr> </tbody> </table>	Person Code	Preferred Full Name	Staff ID	Current?	Student ID	Person Type	0000239273	David Thomas		<input checked="" type="checkbox"/>		External	0000282530	David McD Taylor		<input checked="" type="checkbox"/>		External	BERLOWDJ-1	David J. Berlowitz		<input checked="" type="checkbox"/>		External	HARED-1	David L Hare		<input checked="" type="checkbox"/>		External	STORYD-1	Dr David Story		<input checked="" type="checkbox"/>		External	TAYLORD-1	David Taylor		<input checked="" type="checkbox"/>		External
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<p>5. Click on Search to display records matching your criteria</p>																																											

- If a record already exists with a Person Type of External and an appropriate Person Code, update relevant fields by referring to the steps described below
- If a record exists with a Person Type of Internal, note down the Staff ID, create a new record by referring to the steps described below and record the Staff ID in the Staff ID field on the new record (Note that the Staff ID is also the Person Code for the Internal record, while a new Person Code should be created for the External Record)
- If no existing record, create a new record by referring to the steps described below

To record a new external supervisor / examiner's details

<p>6. From the home screen, select Personnel and then select Personnel again from the top menu and drop down list</p> <p>7. Select ADD to create a new record</p>	
<p>8. Create a Person Code as per the instructions below</p> <p>9. If Applicable, record former internal staff ID</p> <p>10. Complete the following fields</p> <ul style="list-style-type: none"> ○ Title (<i>Salutation: Mr, Mrs, Prof, Dr. etc</i>) ○ First Name ○ Middle Name ○ Family Name <ul style="list-style-type: none"> • Preferred names will default to names entered but may be overridden • The Full Name (and Preferred Full Name) is automatically created based on other names entered <p>SAVE / BACK</p>	

<p>11. Scroll down to “Person Type” section and select the record marked “Not Specified”</p> <p>12. Change the “Type” to “External” from the dropdown menu</p> <p>13. Ensure the “Current” box is ticked</p> <p>SAVE / BACK</p>	
<p>14. Scroll down to “Details” section and expand if necessary</p> <p>15. Using the search function, select the appropriate External Organisation (The organisation name will populate automatically)</p> <p>SAVE / BACK</p>	

Person Code

- The First seven (7) letters of the SURNAME (capitalized) (Or the entire surname if less than 7 characters)
- The first letter of the First/Given Name (capitalized)
- The dash/minus symbol “-”
- Sequence number starting at 1

For example, the ID of the first John Smith entered would be: **SMITHJ-1**

If you then created a Juliette Smith, it would be: **SMITHJ-2**

In the example on the diagram on page 2, the user created was

Bartholomew Johnstone: JOHNSTOB-1