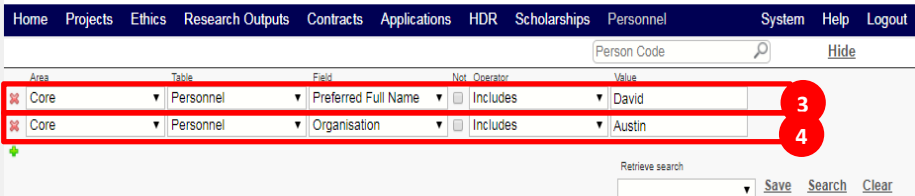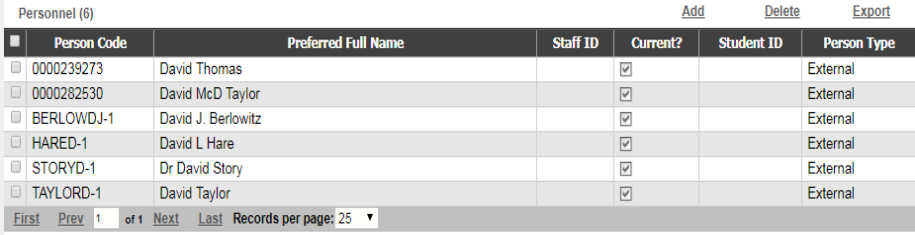# External Person Details

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.
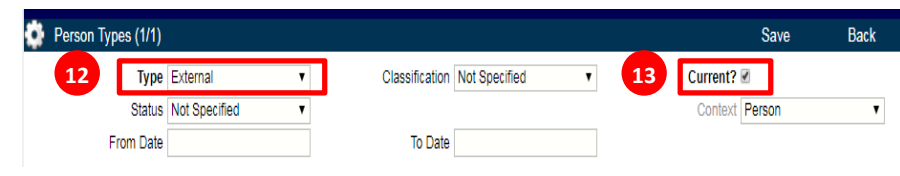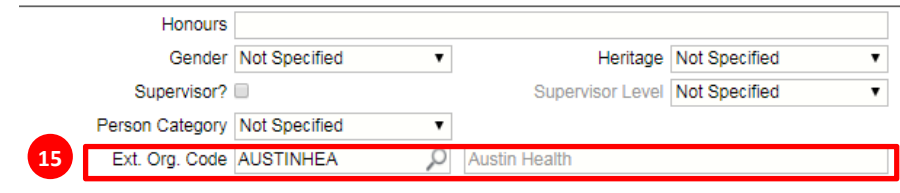
To check if an external researcher's details already exist

1.	From the home screen, select **Personnel** and then select **Personnel** again from the top menu and drop down list	
2.	Select the **Advanced Search** Function *(at the top of the screen)*	
3.	Enter the first search criteria as follows **Area**: Core **Table:** Personnel **Field** Preferred Full Name (or any name field) **Operator** Equal To **Value:** "Name" you are searching for 4. Click on the Add Criteria icon ![icon] to enter another search criteria as follows: **Area**: Core **Table:** Personnel **Field:** Organisation **Operator:** Includes **Value:** *Any part of the organisation name (if know)* 5. Click on Search to display records matching your criteria	

- 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 researcher's details

6. From the home screen, select **Personnel** and then select **Personnel** again from the top menu and drop down list 7. Select **ADD** to create a new record	

8. Create a **Person Code** as per the instructions below
 	
 9. If Applicable, record former internal **staff ID**
 	
 10. Complete the following fields
 	
     o **Title** *(Salutation: Mr, Mrs, Prof, Dr. etc)*
     o **First Name**
     o **Middle Name**
     o **Last Name**
 	
 - **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
 	
 SAVE / BACK	

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

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 **Johnsto**ne: **JOHNSTOB-1**