Corporate Information Systems

http://www.sussex.ac.uk/its/help/bishelp.php

University of Sussex

SMIS0009 - Person-Group Memberships

To Search for a Group

You can search for groups that you have access to view. Click ↓ to move through the list.

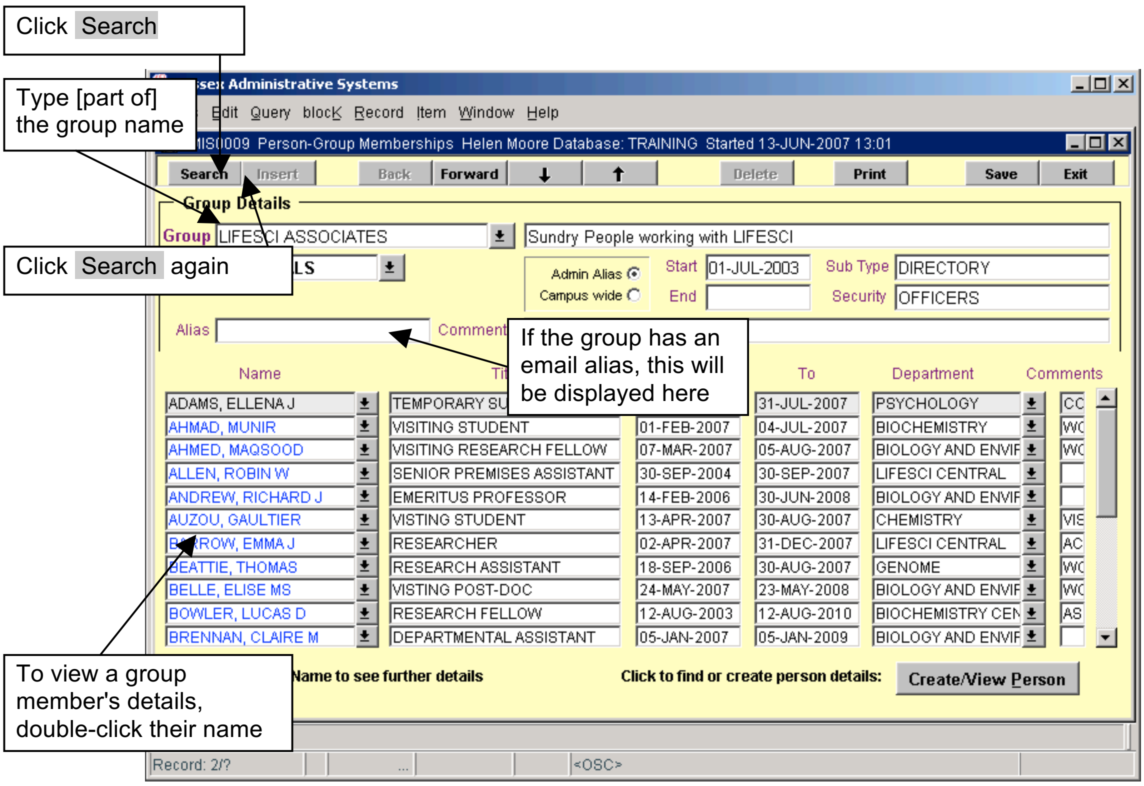
To search for a specific group:

1. With the cursor in the 'Group' box, click Search
2. Either type the group name in the 'Group' box and click Search again
   OR

Type the first part of the group name in the 'Group' box, click Search again, then click ↓ to move through the list of matches

The lower part of the screen displays group membership. Use the scroll-bar on the right of the screen to view all your group members.

If the group has an email alias, this will be displayed in the 'Alias' box.

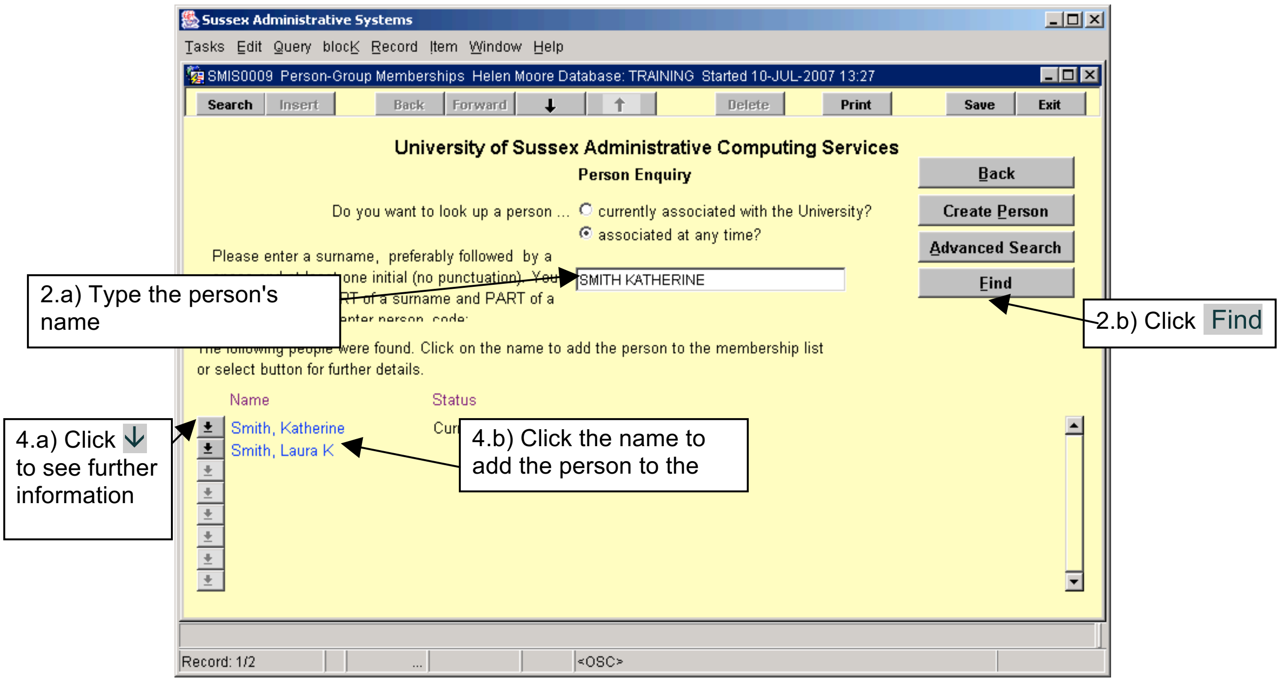


To View a Group Members' details

Double-click the name of the member you wish to view. This will take you to another screen where you will be able to view their address details, etc. Click Back to return to the main screen.

To Add a Person to the Group

1. Click Create/View Person which will take you to a new screen

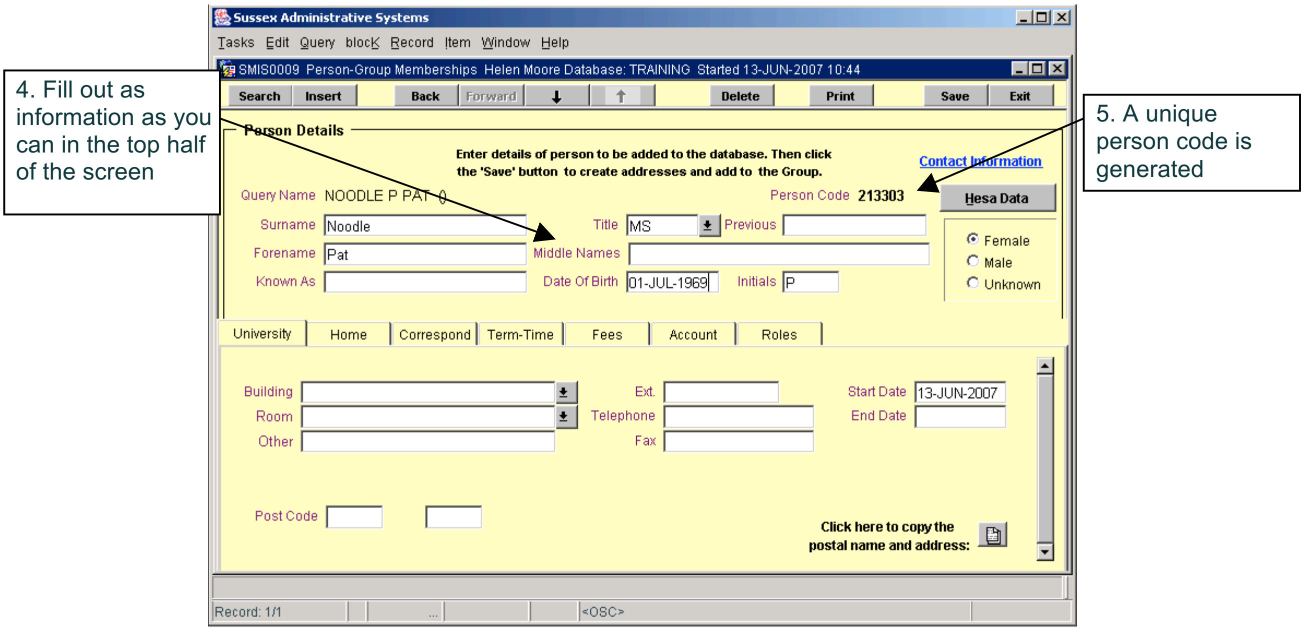


2. Type the name - e.g. SMITH KATHERINE and click Find
3. From the list returned, identify your group member
4. Click ↓ to see further information
   OR
   Click the name to add the person to the group

To Create a Record

THIS SHOULD BE DONE CAREFULLY. When you 'create a person record' you are effectively adding their name and details to the database and also generating their unique number, which is known as their 'Person Code'. <u>It is very important that you don't create a record for a person who already exists on the database. Once a record has been created on the system it cannot be deleted</u>. You should check the system beforehand to make sure you are not creating a duplicate record.

1. Click Create/View Person on the main 'Groups' screen which will take you to a new screen
2. Type the name - e.g. NOODLE PAT and click Find
3. If you CANNOT find the person on the system, click Create Person to take you to a new screen



4. Fill out as much information as you can in the top half of the screen, e.g. 'Date of Birth' or 'Known As' name. This will help identify your person to other users looking at the database
5. Click Save . A unique Person Code will be generated
6. Click in the bottom half of the screen and click on the 'Correspondence' tab. Enter the home address details in the 'Correspondence' section inserting an 'End Date' of one year from now.
7. Click Save
8. Click Back . This will take you back to the top half of the screen. Click Back again. This will take you back to your main 'Groups' screen, where your new person will be added to your groups list
9. Click Save

When Adding a Group Member

- Remove the date in the 'To' field if not required. [It is automatically set at one year from now]. This is important for groups that have email aliases, otherwise the group members will stop receiving email in a year's time
- When you add a member of staff to a group, their job title appears in the 'Title' section. However, this can be overwritten to reflect the person's role within the group

To Delete People from your Group

This will remove a person from the Group but not from the main database. From the main 'Person-Group Memberships' screen, in the list of group membership names, click on the name of the member you wish to delete and click Delete at the top of the screen. Click Save .

'Associates' Groups e.g. 'LifeSci Associates'

Who should be added to the 'Associates' Groups?

- External people who aren't appointed by Human Resources. This does not include Visiting Fellows or Emeritus Professors who are given HR 'appointments'
- People who are already associated with another department, but who also wish to be associated with your department as well
- Associate Staff who don't already exist on the system. They can be added here before being added to the Associate Tutor Pool

Use the arrow to the right of the 'Department' field to associate the staff member to a department.