

## 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:

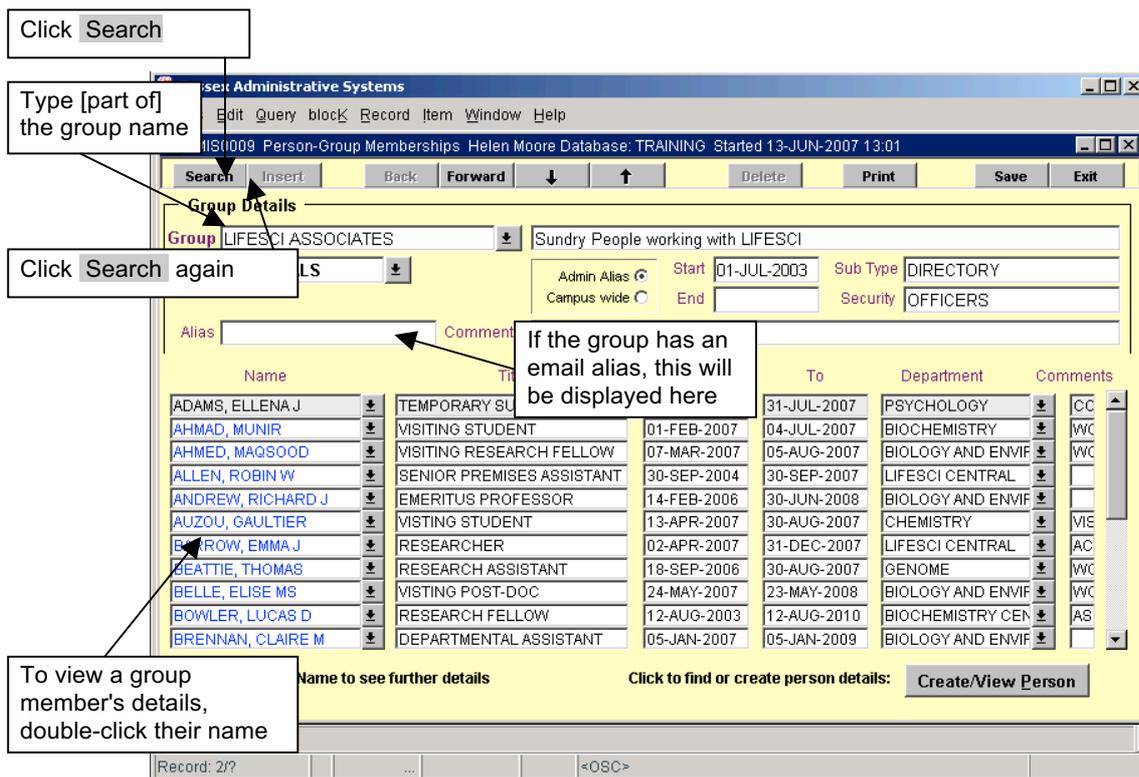
1. With the cursor in the 'Group' box, click **Search**
2. Either type the group name in the 'Group' box and click **Search** again

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.



The screenshot shows the 'Administrative Systems' window for 'SMIS0009 Person-Group Memberships'. The 'Group Details' section shows the group 'LIFESCI ASSOCIATES' with a description 'Sundry People working with LIFESCI'. Below this is a table of group members. Callouts provide instructions: 'Click Search' points to the search button; 'Type [part of] the group name' points to the group name field; 'Click Search again' points to the search button; 'If the group has an email alias, this will be displayed here' points to the 'Alias' field; and 'To view a group member's details, double-click their name' points to the name 'BROOK, EMMA J' in the table.

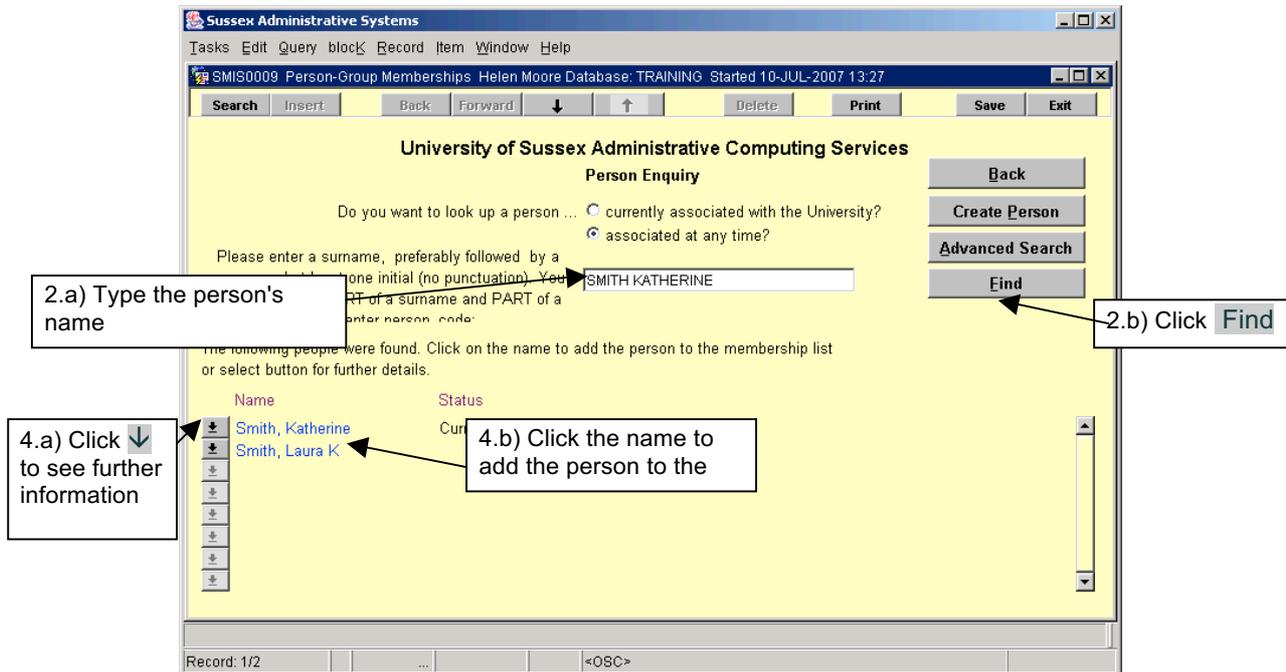
Name	Title	Start	End	To	Department	Comments
ADAMS, ELLENA J	TEMPORARY ST			31-JUL-2007	PSYCHOLOGY	CC
AHMAD, MUNIR	VISITING STUDENT	01-FEB-2007		04-JUL-2007	BIOCHEMISTRY	WC
AHMED, MAQSOOD	VISITING RESEARCH FELLOW	07-MAR-2007		05-AUG-2007	BIOLOGY AND ENVIF	WC
ALLEN, ROBIN W	SENIOR PREMISES ASSISTANT	30-SEP-2004		30-SEP-2007	LIFESCI CENTRAL	
ANDREW, RICHARD J	EMERITUS PROFESSOR	14-FEB-2006		30-JUN-2008	BIOLOGY AND ENVIF	
AUZOU, GAULTIER	VISTING STUDENT	13-APR-2007		30-AUG-2007	CHEMISTRY	VIE
BROOK, EMMA J	RESEARCHER	02-APR-2007		31-DEC-2007	LIFESCI CENTRAL	JAC
BEATTIE, THOMAS	RESEARCH ASSISTANT	18-SEP-2006		30-AUG-2007	GENOME	WC
BELLE, ELISE MS	VISTING POST-DOC	24-MAY-2007		23-MAY-2008	BIOLOGY AND ENVIF	WC
BOWLER, LUCAS D	RESEARCH FELLOW	12-AUG-2003		12-AUG-2010	BIOCHEMISTRY CEN	JAS
BRENNAN, CLAIRE M	DEPARTMENTAL ASSISTANT	05-JAN-2007		05-JAN-2009	BIOLOGY AND ENVIF	

### 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

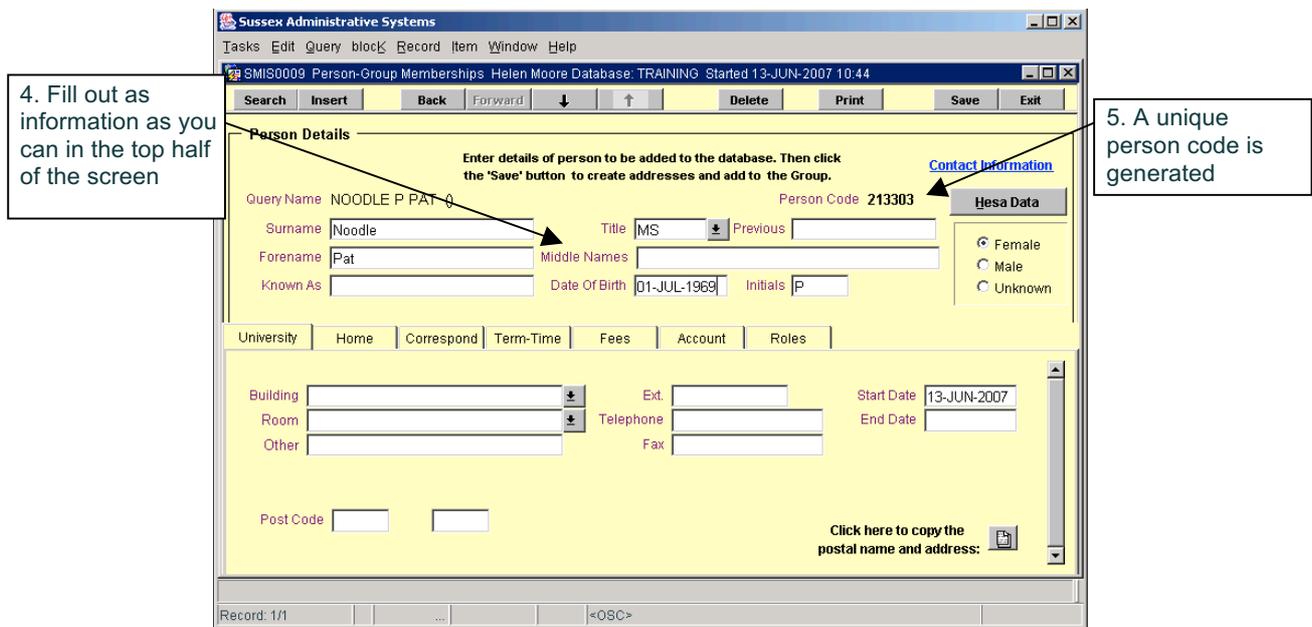


2. Type the name - e.g. SMITH KATHERINE and click **Find**
3. From the list returned, identify your group member
4. Click **↓** to see further information  
OR  
Click the name to add the person to the group

## 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'. 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. 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.