IP8 - Maintaining academic staff listing (White Book) data

For certain appointments (typically academic) additional information will need to be captured for entry in the Academic Staff Listing (White Book) report, as detailed in QRG: PANS0 - Pre-arrival and new starter guide (section F). This guide duplicates the information in section F, and covers updating of the data as and when required.

This guide covers the following process steps:

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Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (Surname followed by first initial) or Personnel No, click Search and open the relevant employee record. The Personal Profile Maintenance window opens:

2. Select Detail > Appointment Details. The Appointment Details window opens.

3. If relevant, click into the Appointment ID to ensure the correct appointment is highlighted. Click the Appointment Details button. The Post Appointment Maintenance window opens.


5. Click to display User Defined Field List of Values.

**To create the UDF for the first time:**

1. Click **New**.

![UDF screenshot](image)

2. Complete the fields as necessary:

<table>
<thead>
<tr>
<th>Field Name (* mandatory)</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date From*</td>
<td>Enter the start date of the appointment.</td>
</tr>
<tr>
<td>Date To</td>
<td>Leave blank</td>
</tr>
<tr>
<td>Include in Whitebook *</td>
<td>Select <strong>Yes</strong> to record that this appointment should appear in the White Book and then ensure the remaining details are provided below.</td>
</tr>
<tr>
<td>Subject Area *</td>
<td>Free text field to enter relevant subject area details.</td>
</tr>
<tr>
<td>Distinction Title</td>
<td>Leave blank – Refer to QRG IP12 – Academic title</td>
</tr>
<tr>
<td>Funding/Special Leave/General Notes</td>
<td>Add as appropriate.</td>
</tr>
<tr>
<td>Titular Contract Start Date</td>
<td>Enter date distinction title is effective from.</td>
</tr>
</tbody>
</table>

3. When the relevant details have been recorded click **OK**. A ‘transaction complete’ message will appear. Click **OK** then **Close**. Exit back as required.
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To update/amend existing details

1. Follow steps **1-6** on page 1 and click on the **Appt:White Book** entry.

2. Select **View/Edit** and add details/make changes as required. E.g. To remove an individual from the report, complete the **Date To** field to reflect when the entry was no longer valid and change the **Include in Whitebook** field to **No**.

3. Click **OK**. A ‘transaction complete’ message will appear.

4. Click **OK** then **Close**. Or, to close the UDF without saving changes click **Cancel**. Exit back as required.

**Ending the previous/current record when adding a new UDF**

1. Go to **Selection** box > **User Data**. The **User Maintenance** window opens.

   ![User Maintenance Window]

2. Click to display **User Defined Field** List of Values.

3. Select the value for the UDF you need to end - **Appt:White Book**

4. In the **Date To** field, enter the date immediately prior to the date of the new entry.

5. Follow steps in **To create the UDF for the first time** above for guidance on adding a new UDF.

To add an additional

1. Follow steps **1-6** on page 1 and click on the **Appt:White Book** entry.

2. To add a new entry follow steps in the section - **To create the UDF for the first time**.
### Useful Reports

You can output this data for your department/division (depending on your access) via:

**PERDEP09 Academic Staffing Listing (White Book).** Note: The full cross-university report will be generated centrally and issued to divisions on a quarterly basis.