

# 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.

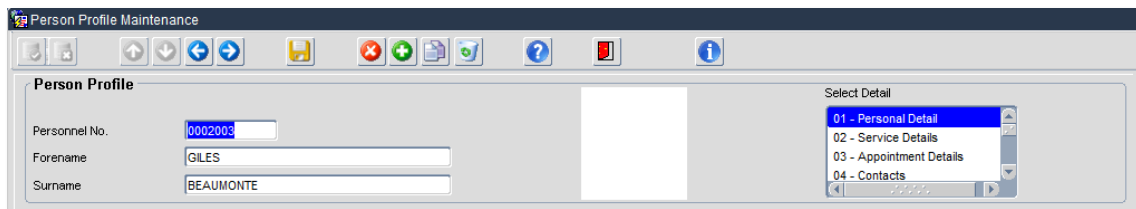
**What's changed?**  
New section added with guidance on adding additional and ending UDFs.  
**Aug 19**

This guide covers the following process steps:

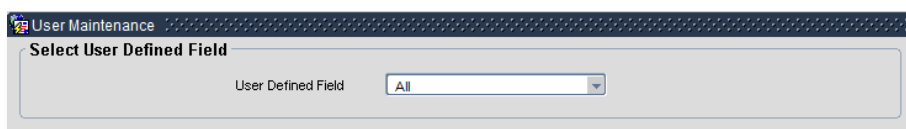
|  |   |
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## Navigate to: Personnel > Maintenance > Personal Profile

1. Enter search criteria e.g. Name (**Surname** followed by first initial) or **Personnel No**, click  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  button. The *Post Appointment Maintenance* window opens.
4. Go to **Selection box > User Data.** The *User Maintenance* window opens.



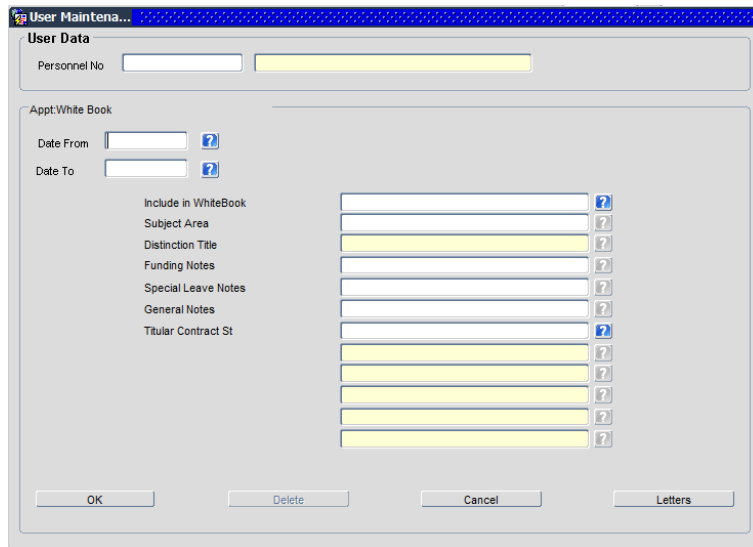
5. Click to display **User Defined Field** List of Values.

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6. Select **Appt:White Book**.

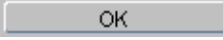


To create the UDF for the first time:

1. Click .



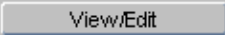
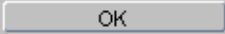

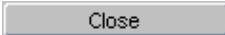
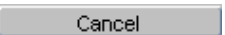
2. Complete the fields as necessary:

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

3. When the relevant details have been recorded click . A 'transaction complete' message will appear. Click  then . Exit back as required.

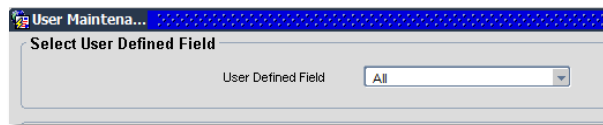
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## To update/amend existing details

1. Follow steps **1-6** on [page 1](#) and click on the **Appt:White Book** entry.
2. Select  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 . A 'transaction complete' message will appear.
4. Click  then . Or, to close the UDF without saving changes click . 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.



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](#).

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## Useful Reports

A small, partially visible thumbnail image of a spreadsheet. It shows a grid of cells with numerical values. The visible values include +2,000, +5,000, +1,500, +1,125, and +1,062. The cells are arranged in a column, with the values decreasing from top to bottom.

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.