

TR7 – Adding an external person

All University staff will be available in the system. New starters are added when they are marked as a preferred candidate within the e-Recruitment module of CoreHR, so you are able to book them on a course prior to their start date. You should not create a record for a new University starter.

For College Employees a data load was completed to the External Person screen for all existing college staff up to August 2012. Any new College starters will need to be created as a new external person. Care need to be taken to make sure they do not already exist to ensure the training history is maintained on a single record.

Navigate to: Personnel > Training > Maintenance > External Person

1. Change the **Person Type** to **Other**.

2. Enter details as follows:

Field Name (* mandatory)	Description
Title, Initials, Forename, Surname, Address, Post code, Phone no.	Enter details
Department	Select the relevant department/college from the LoV
External Person Type	Select from the LoV as applicable
Email Address	Enter details
Client	Select the relevant department/college from the LoV
External Reference	Enter Individual's Single Sign-On (SSO)

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Note: If the email address is not populated then no email notification can be sent to the external candidate.

3. Save the information: either click  or press **F10** on your keyboard.
4. The *Personnel No* will auto generate with the next available external reference.



Note: All External Reference numbers are prefixed with 'E' so they are easy to identify. i.e. E4501.

Edit External Person Details

Navigate to: Personnel > Training > Maintenance > External Person

1. In the *Maintain External Person* screen, click on  to enter query mode.
1. Enter the **Personnel No/External Reference**, or click on  or press **F9** to select from a list.
2. You can type their surname in the search screen to help you find their personnel reference. Select the external person from the list. Their details are returned to the screen.



Note: Wildcard searching on surname is possible:

- Surname starting with CON use CON% in the search field.
- Surname with WHITE within Surname use %WHITE%
- Surname with Upper & Lowercase i.e. McVay use %McVay%

3. Update their details.
4. Save the information: either click  or press **F10** on your keyboard.