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1 Person Maintenance

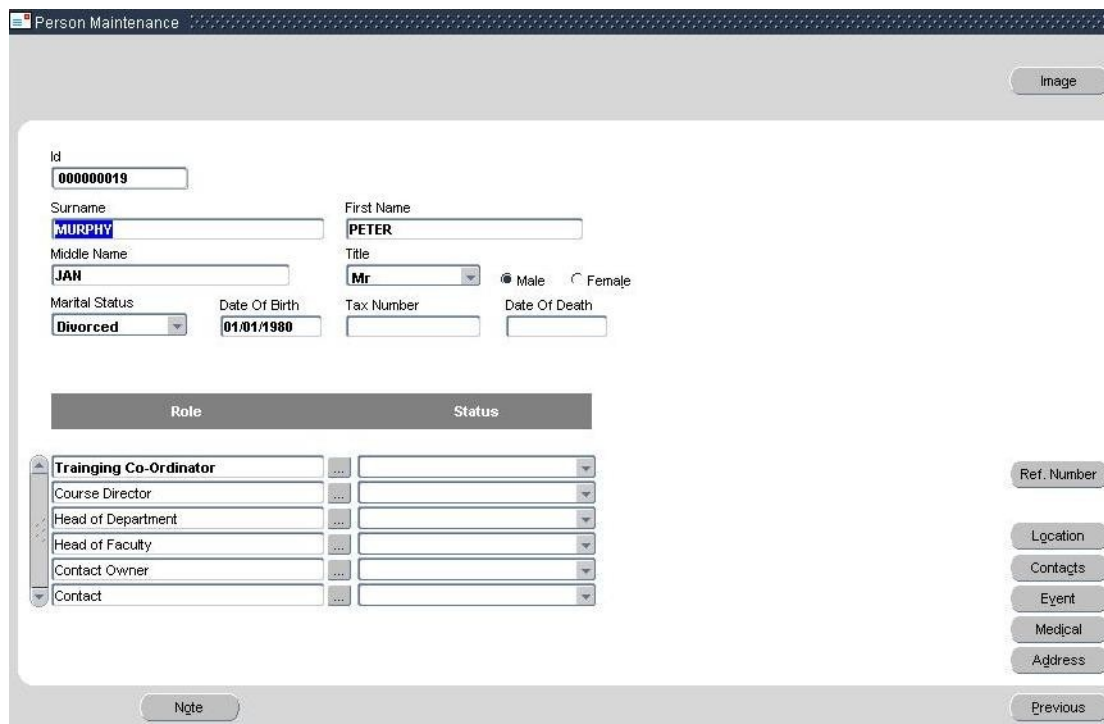
The following topics are treated in this section:

- Address Maintenance
- Allocating Mentors
- Allocating Tutors
- Contact Maintenance - Applicant
- Contact Maintenance - Person
- Importing Student Images
- Inclusion in Events
- Medal Details
- Merging Duplicates
- Person Note Maintenance
- Reference Number
- Person Enquiry
- Person Location Maintenance
- Student Category

Information about people, on which data is held in the system, is entered and maintained via the **Records | Maintain Person** menu option. Such people are not necessarily users of the system. The initial screen presents options to **Add** or **Modify** a person. When the latter option is taken a person selection screen will be displayed before the Person Details screen.

1.1 Person Details Screen

The Person Details screen presents the options to create a new person or to maintain an existing person. If the latter option is taken, a list of persons will be displayed with a filter and a person is selected by pressing the corresponding  button. The Person Maintenance screen will then be displayed.



The screenshot shows the 'Person Maintenance' form with the following fields and options:

- Id:** 000000019
- Surname:** MURPHY
- First Name:** PETER
- Middle Name:** JAH
- Title:** Mr
- Gender:** Male (selected), Female
- Marital Status:** Divorced
- Date Of Birth:** 01/01/1980
- Tax Number:** [Empty]
- Date Of Death:** [Empty]

Role and Status Selection:

Role	Status
Training Co-Ordinator	[Dropdown]
Course Director	[Dropdown]
Head of Department	[Dropdown]
Head of Faculty	[Dropdown]
Contact Owner	[Dropdown]
Contact	[Dropdown]

Navigation and Action Buttons:

- Image (top right)
- Note (bottom left)
- Previous (bottom right)
- Ref. Number (right sidebar)
- Location (right sidebar)
- Contacts (right sidebar)
- Event (right sidebar)
- Medical (right sidebar)
- Address (right sidebar)

Fields:

- **Title:** One of a list set up according to section .
- **Marital Status:** One of a hard-coded list.
- **Date of Death:** Date of decease.
- **Role:** This represents the role of the person (e.g. in the institution) and is one of a list of registered Person Types (see section).
- **Status:** One of a list of role specific statuses (see section).

Buttons:

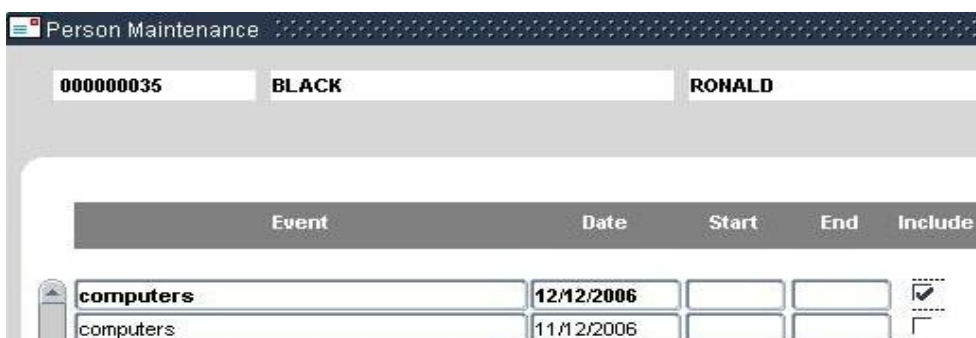
- **Image:** This will import a corresponding existing image from the QuercusPlus Images folder on the application server. The image file must be in JPEG format and named according to the ID (padded to 8 characters with leading zeros). See also section 1.4.
- **Ref. Number:** Provides access to reference number maintenance (see section 1.3).
- **Location:** This provides access to Person Location Maintenance (see section 1.5).
- **Contacts:** This provides access to Contact Maintenance (see section 1.6 for details).
- **Event:** This button is used for including a person in events (see section 1.1.1).
- **Medical:** Maintain notes about medical conditions (see section).
- **Address:** Maintain address information (see section 1.1.2).
- **Note:** Maintain notes – see section 1.1.3.

1.1.1 Inclusion in Events

This section is accessed via the **Event** button on the Person Details screen (see section 1.1). It can be used to include a person in one or more events, which have already been set up (see section). Events in which the person is already included will be listed on a screen such as follows:



The **Add Events** button can be used to select one or more events from a list of available events:



Person Maintenance

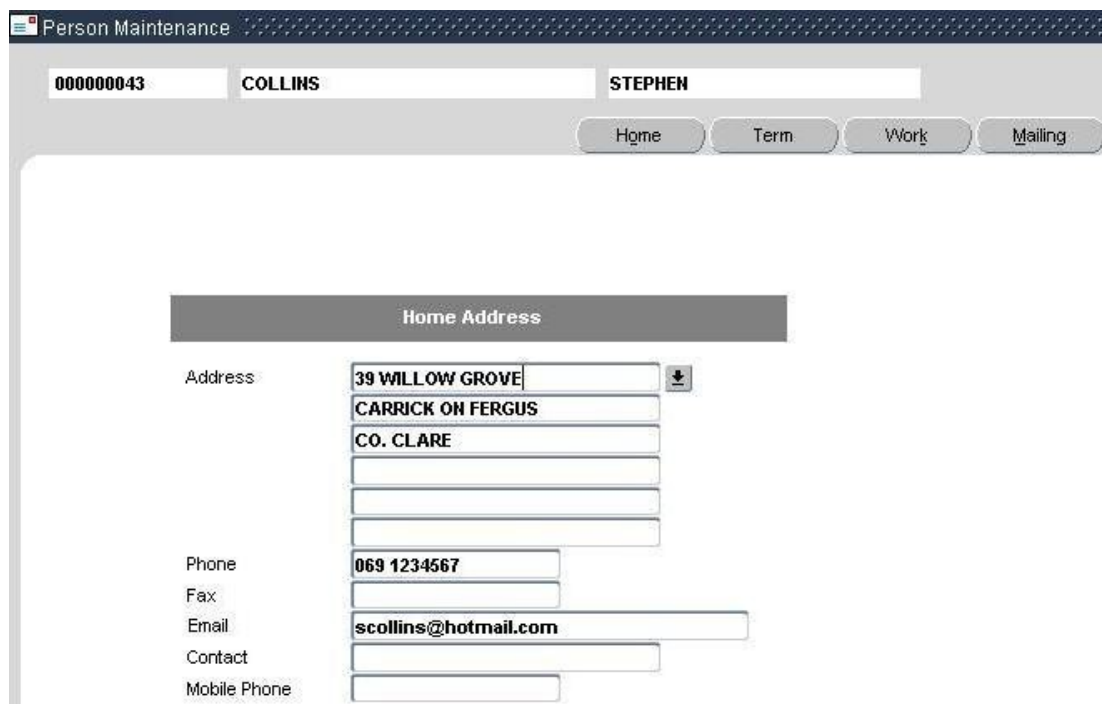
000000035 BLACK RONALD

Event	Date	Start	End	Include
computers	12/12/2006			<input checked="" type="checkbox"/>
computers	11/12/2006			<input type="checkbox"/>

On selecting one or more events for inclusion and pressing the **Event** button, the previous screen will be updated and displayed.

1.1.2 Address Maintenance

This section is accessed via the **Address** button on the Person Details screen (see section 1.1). The Home Address tab will be displayed at first.



Person Maintenance

000000043 COLLINS STEPHEN

Home Term Work Mailing

Home Address

Address: 39 WILLOW GROVE
CARRICK ON FERGUS
CO. CLARE

Phone: 069 1234567

Fax:

Email: scollins@hotmail.com

Contact:

Mobile Phone:

The Term and Work Address tabs are similar; the former includes a **Copy** button which can be used to copy the home address to the term address.

1.1.3 Person Note Maintenance

This section can be accessed via the **Note** button on the Person Details screen (see section 1.1).

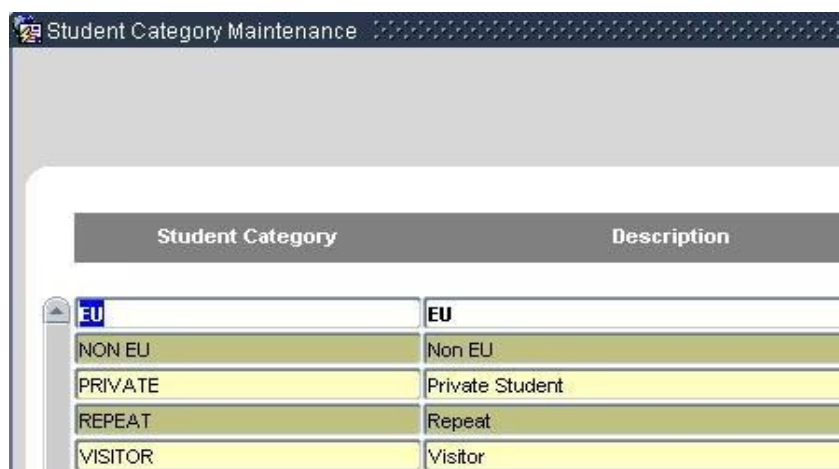


Fields:

- **Type:** One of a list specified as per section
- **Date Closed:** A date is entered to close a note.
- **Note:** Text of note of length up to 255.

1.2 Student Category

Student Category is managed via the **Records | Static Data maintenance | Student Category** menu option.



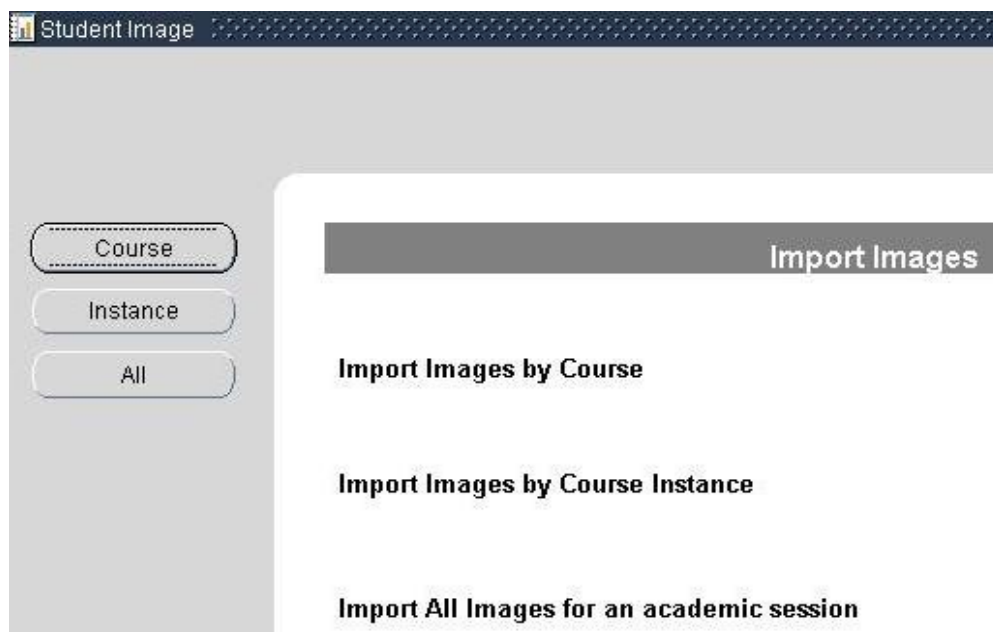
1.3 Reference Number

Reference number management can be accessed by pressing the **Ref. Number** button on the initial Person Maintenance screen (see section 1.1) or on the Register Student screen (see section) or on the Maintain Student screen (see section).



1.4 Importing Student Images

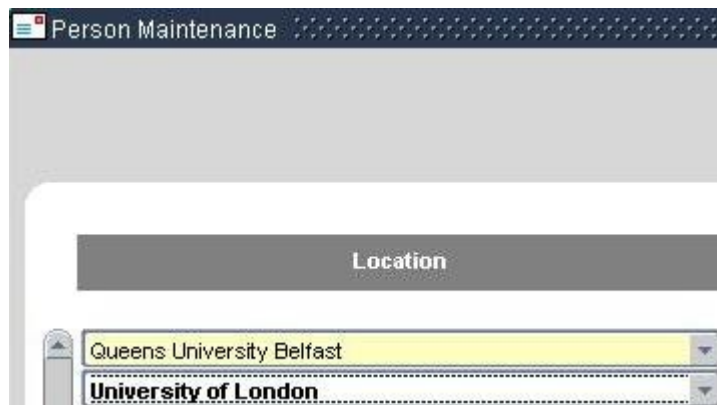
Student images can be imported from the file system via the menu option **Records | Import Student Image**.



Depending on the option chosen on the initial screen, a course or course instance selection screen may be displayed before the import screen.

1.5 Person Location Maintenance

A person may be involved with an institution at more than one location.

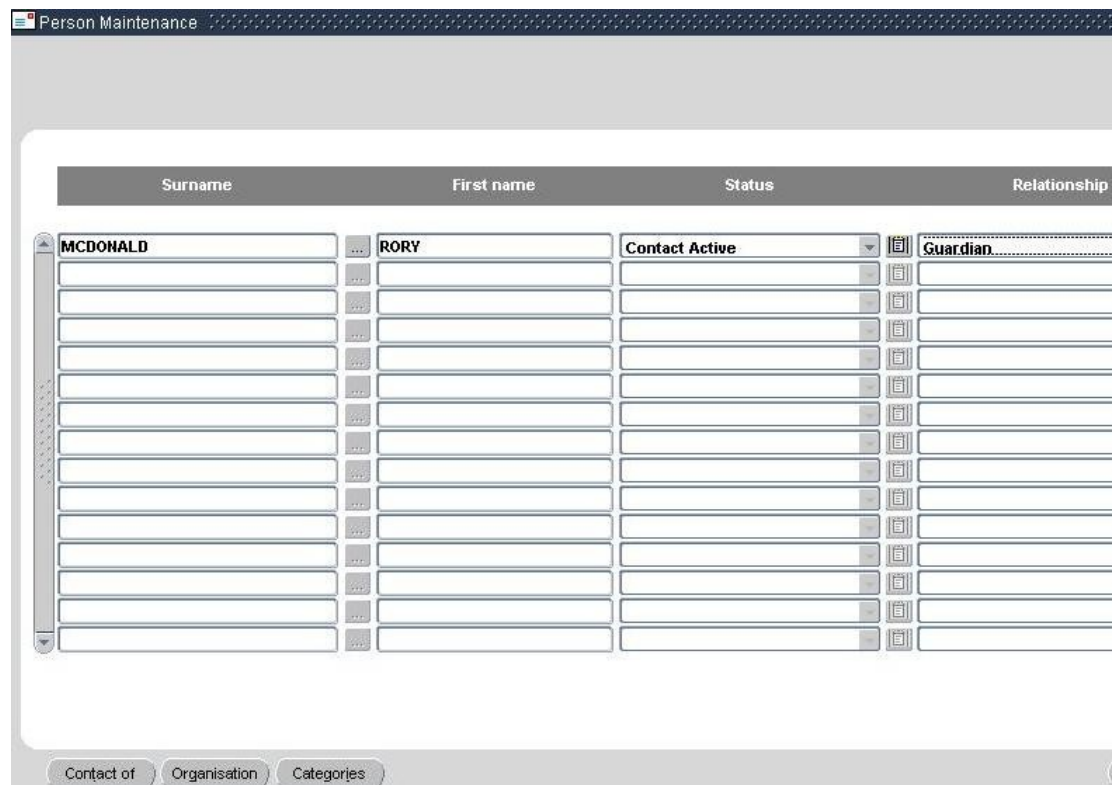


Location is selected from a list registered according to section .

1.6 Contact Maintenance - Person


This functionality is accessed via the **Contacts** button on the Person Details screen (see section 1.1). The **Contacts** button will be enabled only if the **Role/Person Type** is either *Contact* or *Contact_Owner*.

The *Contact* role specifies that a person can be used as a contact. The *Contact Owner* role specifies that a person can have contacts.



Buttons:

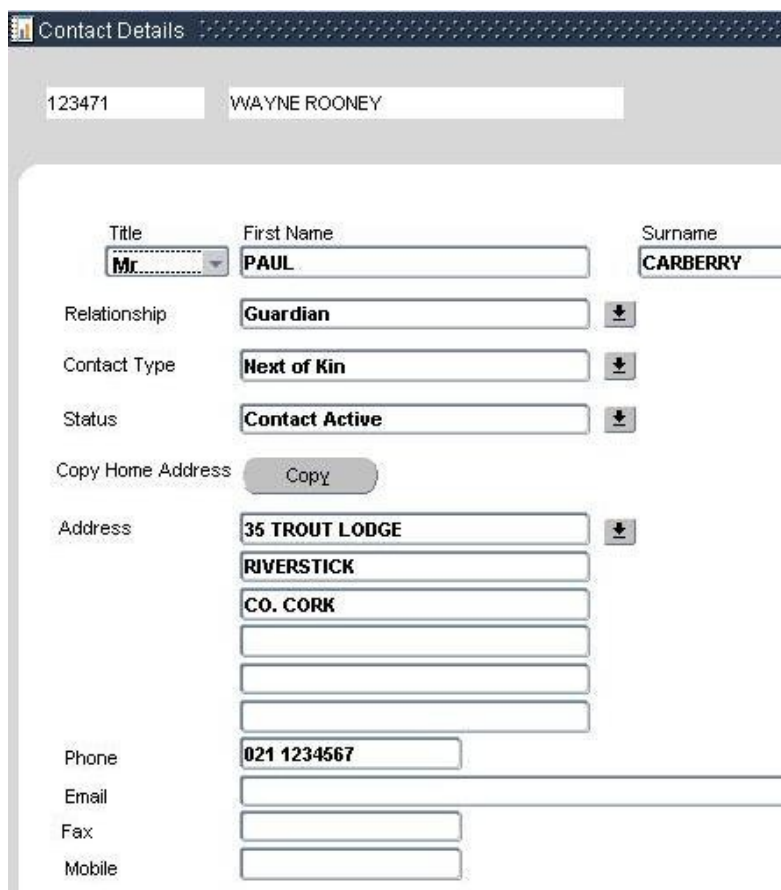
- **Contact Of:** List of person contacts of the selected record.
- **Organisation:** List of organisation contacts of the selected record.
- **Categories:** Maintain contact categories – see section .

One or more contacts can be selected from a list of people whose Person Type(s) includes *Contact*, by pressing the ellipses (...) button. The  button is used for maintenance of transactions concerning the corresponding contact.

There are also facilities for storing notes with dates, times and type of contact. This allows the maintenance of details about who has been contacted when and why. If the person is a contact owner details of what contacts belong to them can be accessed; this allows the institution to build up information about contacts and allows a Contact Owner to review details of their contacts. Organisations can also be treated as contacts.

1.7 Contact Maintenance - Applicant

This functionality is accessed via the **Contact** button on the Direct Admissions maintenance screen (see section). The initial screen lists current contacts with an **Add Contact** button to add a new contact. The New Contact screen will be similar to the following:



Fields:

- **Title:** Selected from a list specified as described in section .
- **Relationship:** Selected from a list specified as described in section .
- **Contact Type:** Selected from a list specified as described in section .
- **Status:** Contact Status is selected from a list specified as described in section .

On saving the record the new contact will appear in the list as in the following screen:



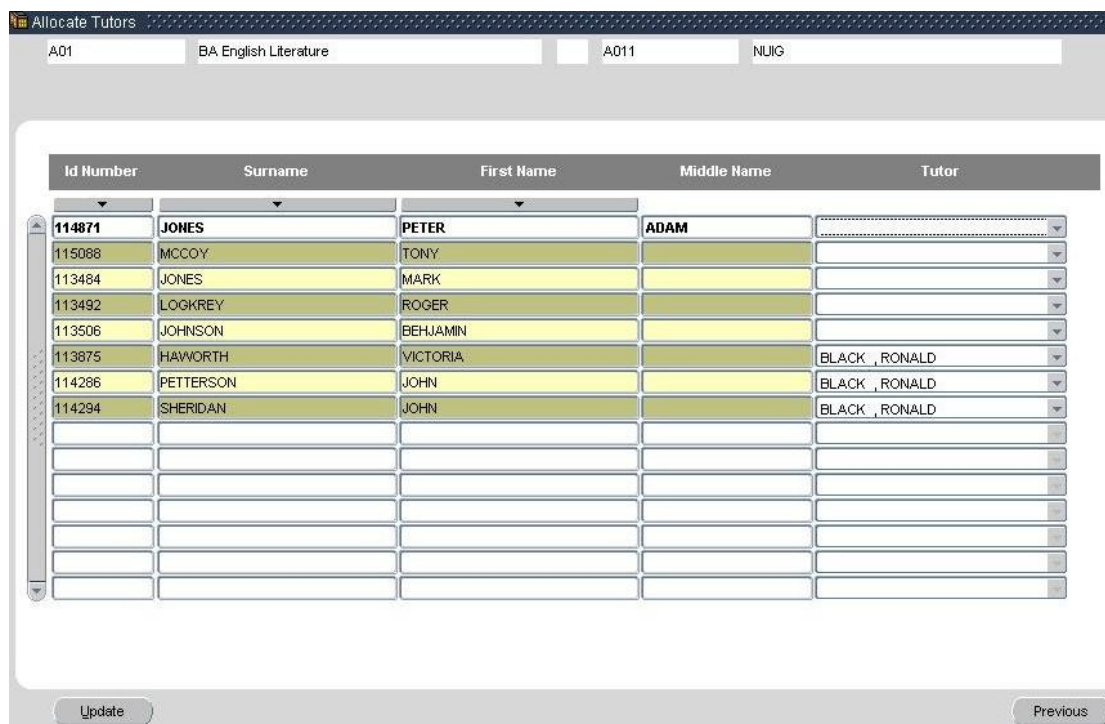
Surname	First Name	Relationship	Type	Status
CARBERRY	PAUL	Guardian	Next of Kin	Contact Active

Button:

- **Add Contact:** Add another contact – see above.

1.8 Allocating Tutors

Tutors are allocated to students by means of the **Records | Allocate Tutors** menu option. A course selection screen is initially displayed with a filter and options to view course details and notes. On selecting a course the students registered for it are listed with their tutors on a screen such as follows:



Id Number	Surname	First Name	Middle Name	Tutor
114871	JONES	PETER	ADAM	
115088	MCCOY	TONY		
113484	JONES	MARK		
113492	LOGKREY	ROGER		
113506	JOHNSON	BEJAMIN		
113875	HAWORTH	VICTORIA		BLACK , RONALD
114286	PETTERSON	JOHN		BLACK , RONALD
114294	SHERIDAN	JOHN		BLACK , RONALD

Tutors are allocated by selection from the Tutor list (a list of Persons of type Tutor specified as per section 1.1.). Individual allocations can be made by using the record management *Save* option.

The **Update** button can be used to allocate the same tutor to all listed students; a tutor selection screen such as follows will be displayed:



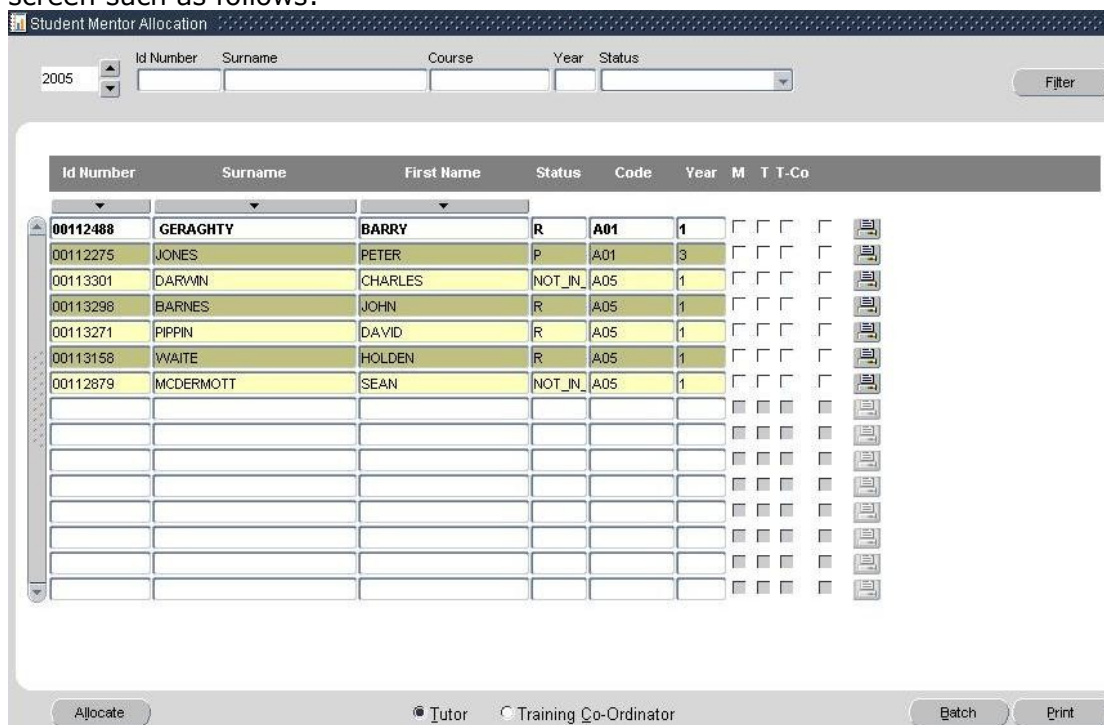
BLACK , RONALD
 BROWN , PETER
 MURPHY , PETER

Select tutor from list and press Allocate Button to Allocate a Tutor to all on the Course with No Tutor previously allocated

A tutor is selected and the **Allocate** button pressed. Allocation of a tutor by this method will not overwrite existing allocations.

1.9 Allocating Mentors

Tutors, mentors and training co-ordinators are allocated to students through the **Records | Allocate Mentors/Tutors** menu option. Students will be listed on screen such as follows:




Id Number	Surname	First Name	Status	Code	Year	M	T	T-Co
00112488	GERAGHTY	BARRY	R	A01	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00112275	JONES	PETER	P	A01	3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00113301	DARWIN	CHARLES	NOT_IN	A05	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00113298	BARNES	JOHN	R	A05	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00113271	PIPPIN	DAVID	R	A05	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00113158	WVAITE	HOLDEN	R	A05	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
00112879	MCDERMOTT	SEAN	NOT_IN	A05	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
						<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Fields:

- **M (Mentor):** Allocate a mentor selected from a pop-up list.
- **T (Tutor):** Allocate a tutor selected from a pop-up list (see also section 1.1).
- **T.Co (Training Co-ordinator):** Allocate a training co-ordinator selected from a pop-up list.

Buttons:

- : Print the list.
- **Allocate:** Allocate mentors.
- **Tutor:** Select to batch allocate a tutor.
- **Training Co-ordinator:** Select to batch allocate a training co-ordinator.
- **Batch:** Batch allocate to selected students.

Allocation can be carried out on individual students via the corresponding checkboxes. Allocation of a tutor or training co-ordinator to a batch of students can be carried out by selecting the students (via the rightmost checkboxes), the radio button for Tutor or Training Co-ordinator and pressing the **Batch** button. On selecting a tutor or training co-ordinator from the popped up window, a list of the selected students will be displayed in a window such as follows:

Student Mentor Allocation

TUTOR: Surname: First name:

Id Number	Surname	First name
000113670	FAY	DECLAN
000113476	O'NEILL	STEPHEN
000113875	FOWLER	ROBBIE







On pressing the **Create** button, allocation proceeds and the allocation will be reflected on the initial screen.

1.10 Merging Duplicates


Duplicate student records can be merged through use of the **Records | Merge Duplicates** menu option. A list of students will be displayed on a screen such as follows:

Duplicates


Id Number: Surname: First Name:

Id Number	Surname	First Name	Middle Name	Date Of Birth	Post Code	
246	WALTERS	JOHN		10/11/1990	PL15 7PG	
134473	O SULLIVAN	SINEAD				
134481	O SULLIVAN	SARAH				
134503	O SULLIVAN	SARAH				
134511	O SULLIVAN	SUSAN				
134538	OSULLIVAN	SINEAD				

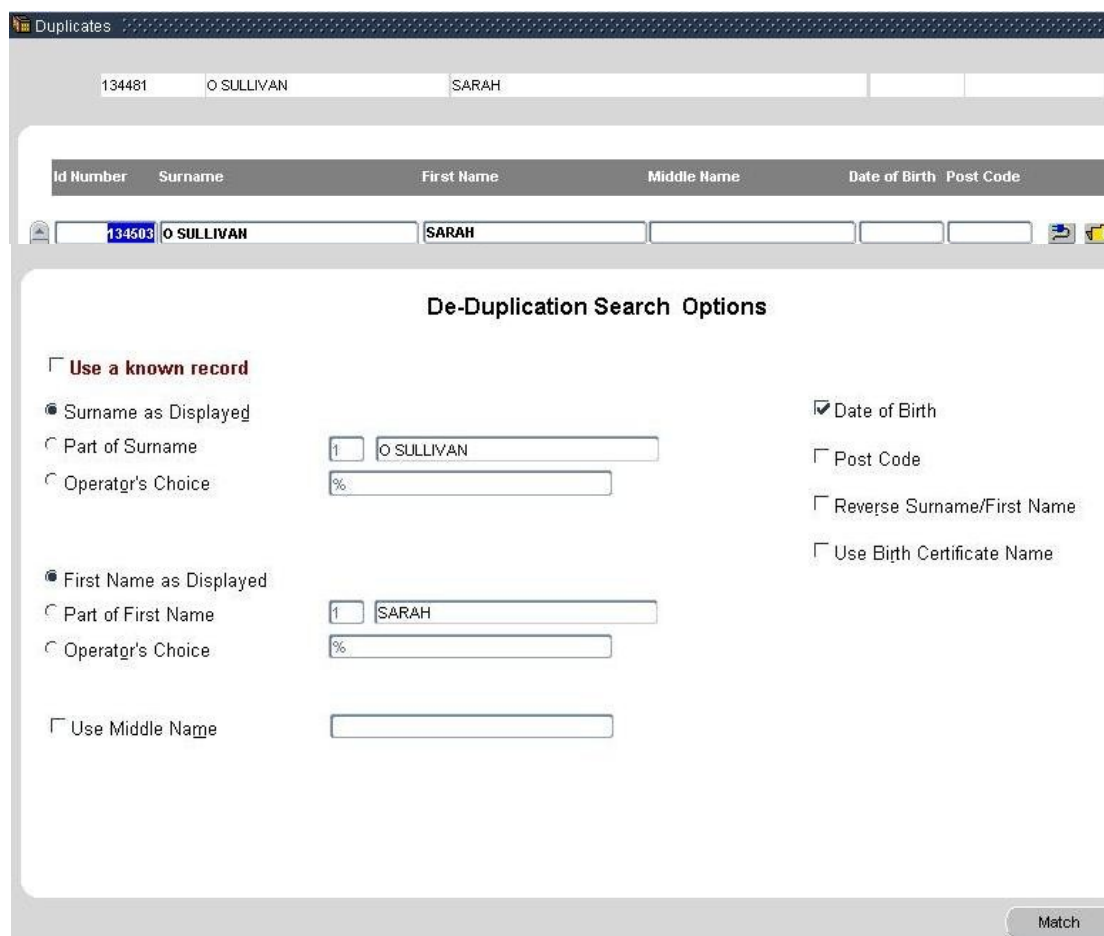
Buttons:

- : Select record for merging (see following section).
- **View**: View candidate records for merging (see section 1.10.2).

1.10.1 Merge Person Records

This section is accessed via the  button on the initial Duplicates screen (see preceding section). On selecting a student a screen for specification of matching criteria such as follows will be displayed:

On pressing the Match button a list of candidate duplicate records will be displayed on a screen such as in the following example:





The screenshot shows a 'De-Duplication Search Options' window. At the top, there are input fields for 'Id Number' (134481), 'Surname' (O SULLIVAN), and 'First Name' (SARAH). Below this is a table with columns: 'Id Number', 'Surname', 'First Name', 'Middle Name', 'Date of Birth', and 'Post Code'. The first row shows the current record (134481, O SULLIVAN, SARAH). The second row shows a candidate duplicate record (134603, O SULLIVAN, SARAH) which is highlighted in blue. Below the table is the 'De-Duplication Search Options' section. It has a main heading and several groups of options:

- Use a known record
- Surname as Displayed
 - Part of Surname: 1 | O SULLIVAN
 - Operator's Choice: %
- First Name as Displayed
 - Part of First Name: 1 | SARAH
 - Operator's Choice: %
- Use Middle Name: []
- Date of Birth
- Post Code
- Reverse Surname/First Name
- Use Birth Certificate Name

A 'Match' button is located at the bottom right of the window.

Buttons:

- : Maintain student record (see section).
- : Merge records. A duplicates screen such as follows will be displayed:

The duplicate records are colour coded; the source record is orange/salmon and the destination record is grey. The three checkboxes are used to specify whether to use the corresponding source or destination Address for the destination record (i.e. The record being replaced).

Duplicates			
Merge With	134481	O SULLIVAN	SARAH
Merge From	134503	O SULLIVAN	SARAH
Data from record to Merge to		Data from Record to be Merged	
Address			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Term Address			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Work Address			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mailing Label			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Statistical Information			
Socio Econ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Father's Occ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religion	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ethnic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nationality	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Domicile	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
County	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Mother's Occ	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Merge Previous

On pressing the **Merge** button an attempt will be made to merge the records as specified. A message will indicate the success or otherwise of the attempt e.g. "Records Merged". On successful merging, a message such as follows will be displayed:



To complete the merging process the **OK** button should be pressed.

1.10.2 Viewing and Merging Person Records


This section is accessed via the **View** button on the initial Duplicates screen (see section 1.10).



Fields:

- **Merge To:** Person ID of destination record (the record to be preserved).
- **Surname** (left hand side): Surname for record to be preserved.
- **To Be Merged:** Person ID number for record to be merged.
- **Surname** (right hand side): Surname for record to be merged.
- **Date Merged:** The date on which the merge – if any - was carried out.

Button:

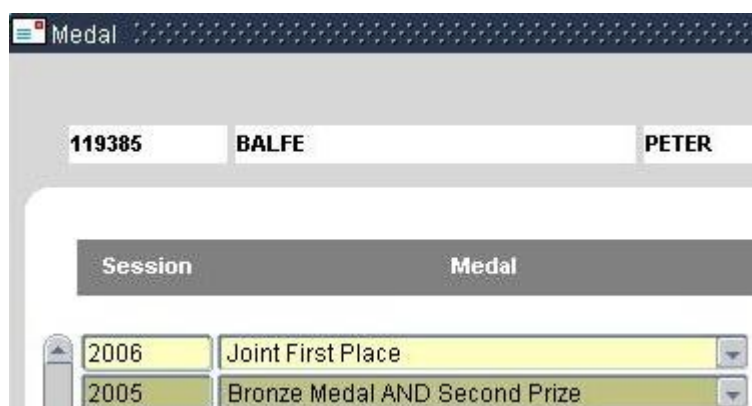
- : Merge corresponding pair of records. A confirmation alert message will be displayed before merging proceeds. A message indicates whether the merge succeeded. On successful merging the **Date Merged** field will be automatically populated.

1.11 Person Enquiry

To view details about a person the **Records | Person Enquiry** menu option can be used. A Person Selection screen followed by a Person Details screen will be displayed (see section 1.1).

1.12 Medal Details

Details of medal awards can be registered and viewed via the **Records | Medal Detail** menu option. An initial student selection screen will be displayed.



The Medal list is maintained as per section .