# 5   User Defined Forms

There is some specific information required by the University which is not held within the standard forms. To enable this specific information to be recorded within Trent, use has been made of the feature "User defined forms." Users can access the information held in User Defined Forms at both personal and position level. Some of this information is used only for the Roll of the Regent House, or by certain members of the contract teams.

1.1 Accessing people information in User Defined Forms

1. Search for the person for whom you wish to view user defined forms information.
2. With their record highlighted select the User Defined Forms menu
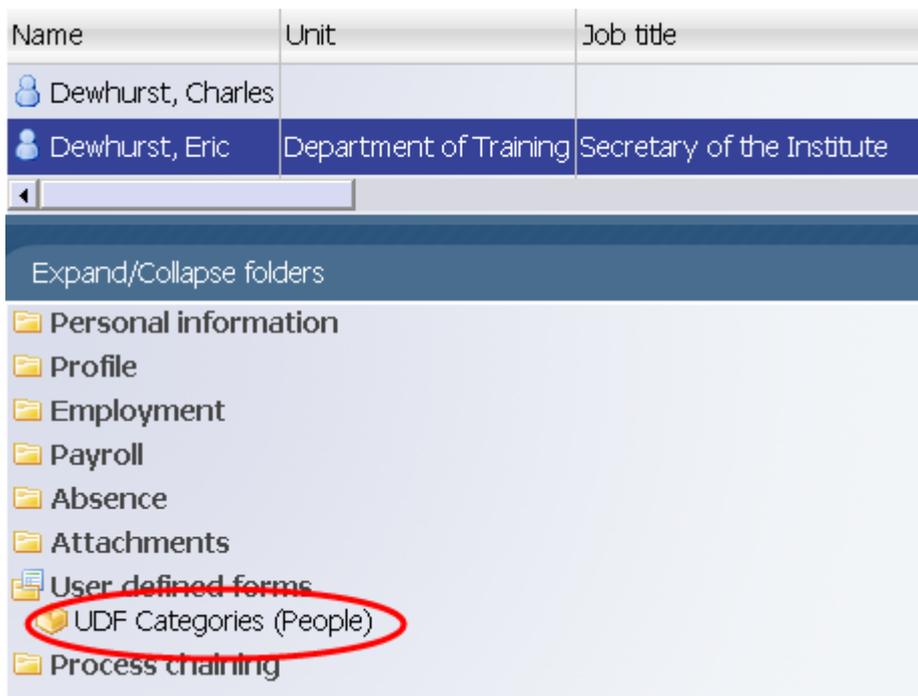
3. Select UDF Categories (People) to display the list of UDFs

UDF category	No. of rows
Clinical Seniority	0
College Membership	0
Contract Sent	0
DP Amalgamation	0
GMC Registration no	0
Name for Roll of Regent House	0
Overpayment Awaiting Recovery	0
Pay & Grading autoincrement protection	0
Payroll URN	1
Pension History Details	2
Personal Data Verification	0
Personal Faculty Membership	0
Personal Roll Details	1
Red circle status	0
Removal Expenses Eligibility	0

Expand/Collapse folders

UDF Categories
UDF Details (People)

4. In the column headed "No. of rows", a 1 indicates that a record is held. To view details select the row – in this example Personal Roll Details, select UDF Details (People)

Personal Data Verification	0
Personal Faculty Membership	0
Personal Roll Details	1
Red circle status	0

Expand/Collapse folders

UDF Categories
UDF Details (People)
Process chaining
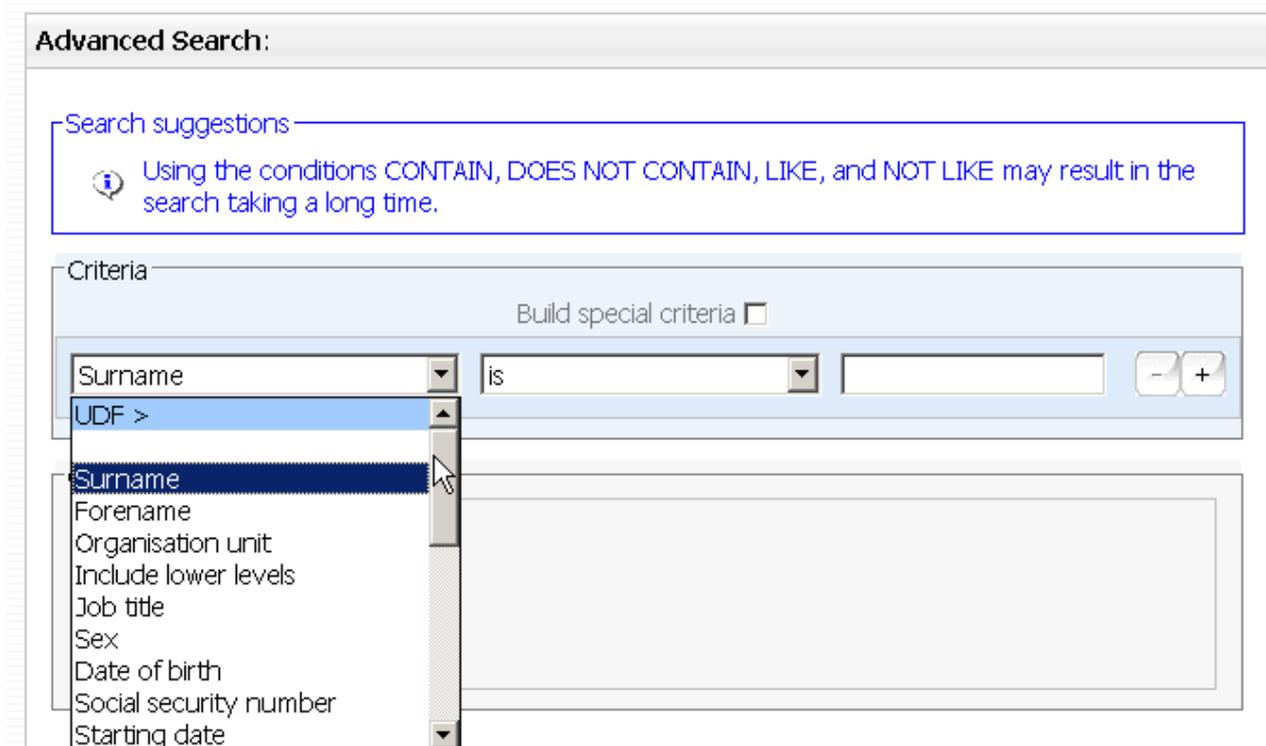
5. The details will be displayed.

1.2   Searching by UDF

A search for UDF details can be performed by making use of the Advanced Search facility.

Navigate: Organisation > People > Advanced Search

1.   Scroll to the top of the list to see UDF (the list is not alphabetical)

2.   Select UDF as the criteria to search by

3. Click the drop down arrow to the right of the "UDF > Click for subfields box"

4. Select the UDF you wish to search by (In this example Red circle status)

5.   Click the drop down arrow to the right of the "Click for subfields" field for the UDF you have chosen

6. Select the required subfield and complete the criteria for the search

7. Click on the search button to start the search.

Headings, Occupancy Maintenance & UDFs

P & G Auto increment protection search is a similar process the last screen should display as below

DP Amalgamation is slightly different as this is a value between 1 - 5 rather than a true value. For this search enter the following criteria on the final screen.

Advanced Search:

Search suggestions

ⓘ Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may result in the search taking a long time.

Criteria

Build special criteria ☐

| No. of Points ▼ | is lower than ▼ | 6 | – + |

Output options

Generate batch ☐

Save as smart group ☐

◉ For Trent ○ For export