

# **Person Maintenance Training Manual GINA**

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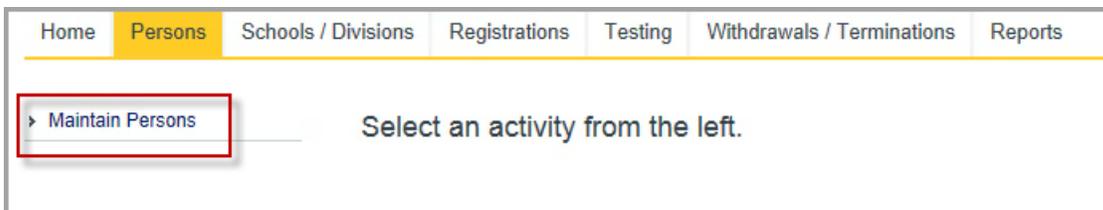
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## INTRODUCTION

Information about people (stakeholders) is maintained from the [Persons](#) menu. All users have access to this functionality; however your access to information about people in GINA is controlled as follows:

1. You can create new people in GINA.
2. You can view all people; however the information you see may be limited.
  - a. You can view all information if it is yourself or a person that you created.
  - b. You can view limited information if it is not a person that you created.
3. You can update information if it is yourself or a person that you created.
4. Regional coordinators and program administrators can view and update all person information in GINA.



- The [Maintain Persons](#) activity allows you to view, create and edit personal information.

## Business Process

Personal information can be entered into GINA from many different areas.

- Trainee, parent and trainer information is entered when creating a pre-registration.
- Tester information is entered when entering marks for a registration.
- Test location administrator information is entered when creating a test location.
- School coordinator information is entered when creating or updating a school.
- Division coordinator information is entered when creating or updating a division.

While this training manual explains how to enter new personal information you will normally do it as part of another process. The screens will operate the same from all places.

Maintain Persons is normally used to view information and update it. For example, as a school coordinator you may have one of your existing trainees come to you because they have a new email address. You would update the existing personal information for that trainee using the Maintain Persons activity.



It is imperative that you **search for a person before you add a new person**. Information about an individual (name, address, phone, email, etc.) should be entered once into GINA. It can be updated and used many times. If you don't find the person on the first search then widen your search criteria. For example enter just the first letter of their last and first name instead of their full name.

## Email Address

Email addresses for people within GINA are not required. If they are entered they must be unique. For example, the same email cannot be added to a trainee and a parent. In this scenario it is recommended to put the email on the trainee. You can see a warning message on screen if the person does not have an email address.

GINA will send out several emails as a registration is moved through its natural lifecycle. If a person does not have an email address then the email will not be sent.

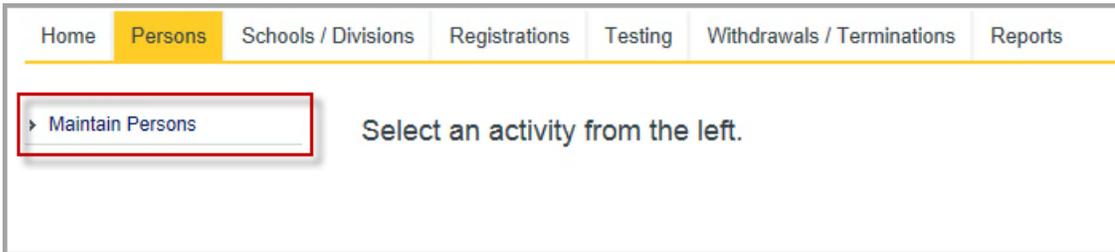


Figure 1: Email Warning Message

## MAINTAIN PERSONS

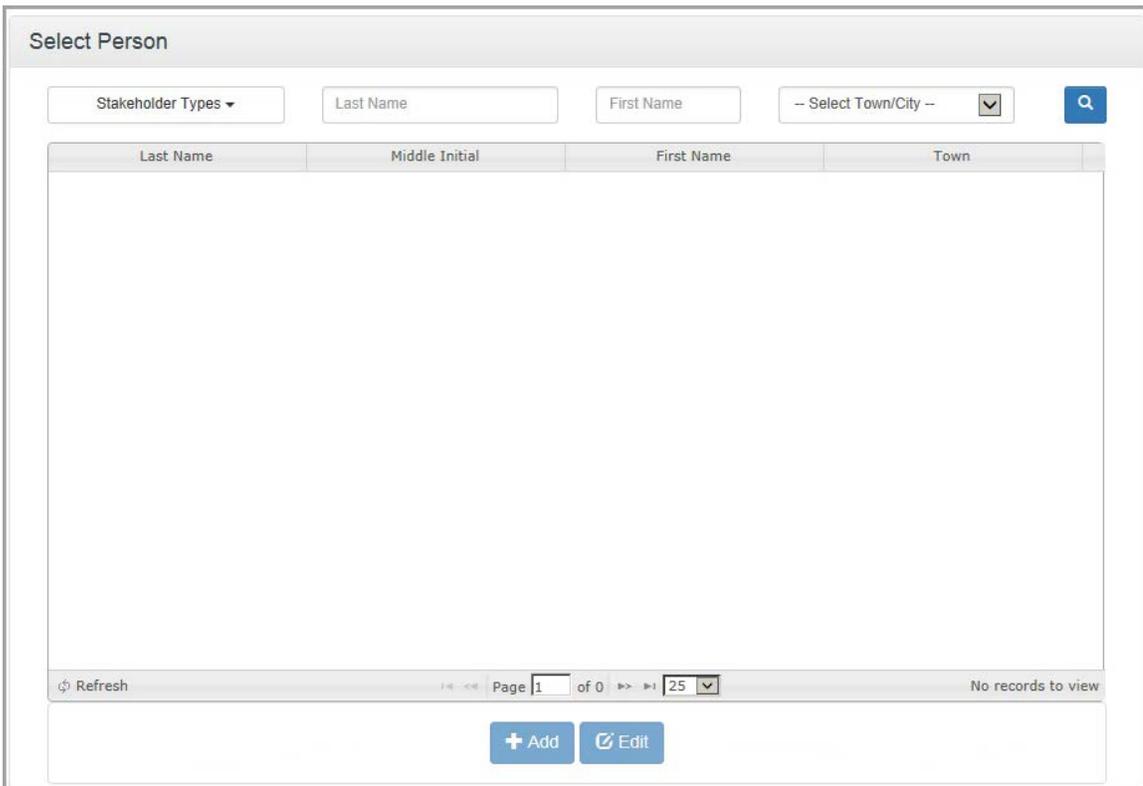
All users have access to this activity.

1. Click the **Persons** menu and the **Maintain Persons** activity to view, update or create a new person.



The screenshot shows a navigation bar with tabs: Home, Persons, Schools / Divisions, Registrations, Testing, Withdrawals / Terminations, and Reports. The 'Persons' tab is active. Below the tabs, a sidebar menu has 'Maintain Persons' highlighted with a red box. The main content area contains the text 'Select an activity from the left.'

2. The **Select Person** form is displayed.



The screenshot shows the 'Select Person' form. It includes a search bar with fields for Stakeholder Types, Last Name, First Name, and a dropdown for Town/City. Below the search bar is a table with columns for Last Name, Middle Initial, First Name, and Town. The table is currently empty. At the bottom of the form, there are buttons for '+ Add' and 'Edit', and a status bar showing 'Page 1 of 0' and 'No records to view'.

- Enter search criteria and click **Search**. **You must search for a person before adding a new one.** This will reduce the number of duplicates in GINA and provide more accurate information. If you don't find the individual try a more generic search. For example use the first letter of their last and first names with the wildcard (%). In the example below we are searching for people where the last name starts with 'b' and contains any characters after that.

Select Person

Stakeholder Types ▾    b%    First Name    -- Select Town/City -- ▾    

Last Name	Middle Initial	First Name	Town
Brown	VA	John	Redwater
Brown	VA	Susan	Radway

- Click the row and click **Edit** to view or update the person.

Select Person

Stakeholder Types ▾    b%    First Name    -- Select Town/City -- ▾    

Last Name	Middle Initial	First Name	Town
Brown	VA	John	Redwater
Brown	VA	Susan	Radway

⌂ Refresh    Page 1 of 1    25 ▾    View 1 - 2 of 2

 Add     Edit

- If you do not have full access to the person then limited information is shown.

### Maintain Person

**Title**

**First Name \***       **Middle Initial**       **Last Name \***

**Province \***

**Town/City \***

Alternate Contacts

No alternate contacts have been specified.

- From the [Select Person](#) form, if you do not find the person in your search then click [Add](#) to create a new person.

### Select Person

Last Name	Middle Initial	First Name	Town
Brown	VA	John	Redwater
Brown	VA	Susan	Radway

Page 1 of 1   
 25   
 View 1 - 2 of 2

7. The **Add Person** form is displayed.

**Add Person**

**Title**  
-- Select Title --

**First Name \*** **Middle Initial** **Last Name \***

**Province \*** Alberta **Address Line 1**

**Town/City \*** -- Select Town/City -- **Address Line 2**

**Postal Code** **Primary Phone \*** **Cell Phone** **Fax**

**Email**

**Username** **Expiry Date**

Contact by email?

**Alternate Contacts** Add

No alternate contacts have been specified.

I have read the [Contact Info Sharing Terms & Conditions](#) and agree to share my contact information.

Save Close

8. Enter as much information as you have. Be careful to spell the name correctly. Fields with an asterisk (\*) are mandatory. Click [Save](#).

### Add Person

**Title**  
-- Select Title --

**First Name \*** Joseph      **Middle Initial** VA      **Last Name \*** Lampert

**Province \*** Alberta      **Address Line 1** Box 555

**Town/City \*** Beaumont      **Address Line 2**

**Postal Code** T6T 4R4      **Primary Phone \*** 780-555-4521      **Cell Phone**      **Fax**

**Email**  
jilampert@ard.com

**Username**      **Expiry Date**

Contact by email?

**Alternate Contacts** Add

No alternate contacts have been specified.

I have read the [Contact Info Sharing Terms & Conditions](#) and agree to share my contact information.