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1 Headships

The post of Head of Department, Deputy Head and Acting Head of Department should be located within the Headships level 1 Post as shown below.



1.1 Creating a Head of Department/Acting Head Post

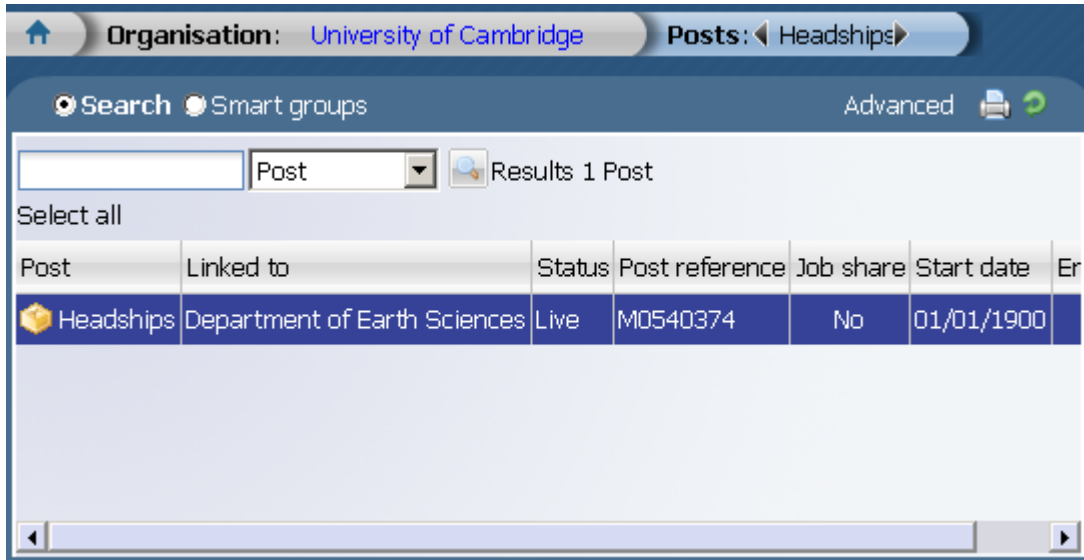
1. With the University of Cambridge selected, click on Organisation explorer.
2. Search for the Department within which you wish to create the new post. Locate the Headships level 1 post and expand this by clicking on the expand icon



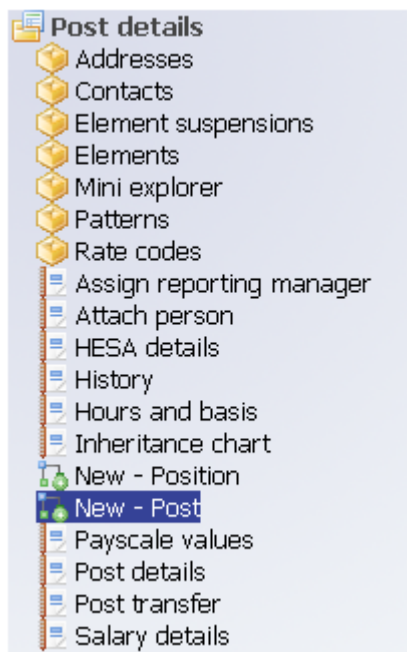
3. Check that the required Headship, Deputy Head, or Acting Head post does not already exist.



4. Where a new post is required, select the Headships level 1 post. The post will be displayed in the top left object pane.



5. Click the Create Post option in the Action Pane.



6. Enter the correct effective date for the start date of the post. Trent opens the Create linked item page in the display pane.

7. Enter the name for the new Post

New - Post:

Name

Quantity

8. Click the button on the Create linked item page to save your changes. A confirmation message will appear

Changes have been saved.
Please enter more details and press save to add another.

New - Post:

Name

Quantity

Trent adds the new Post to the Organisation structure. Select Mini Explorer to view.

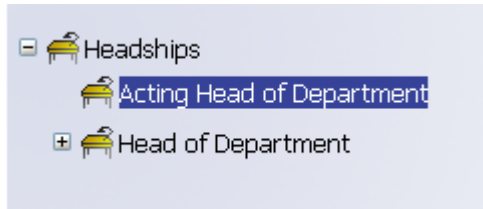
Expand/Collapse folders

- Post details
 - Addresses
 - Contacts
 - Element suspensions
 - Elements
 - Mini explorer
 - Patterns
 - Rate codes

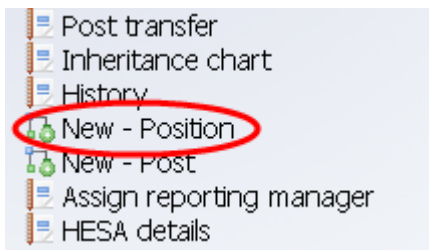
- Headships
 - Acting Head of Department
 - Head of Department

1.2 Creating a new position

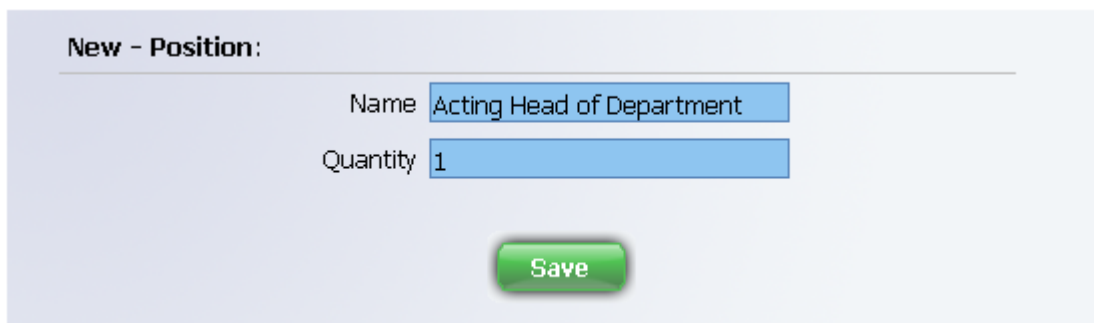
1. Select the newly created post



2. Click the New - Position option in the Action Pane
Enter the correct effective date for the start date of the position.
Trent opens the Create linked item page in the display pane

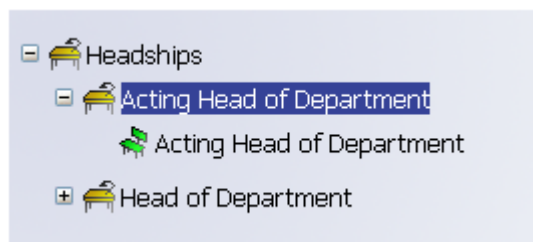


3. Enter the name for the position



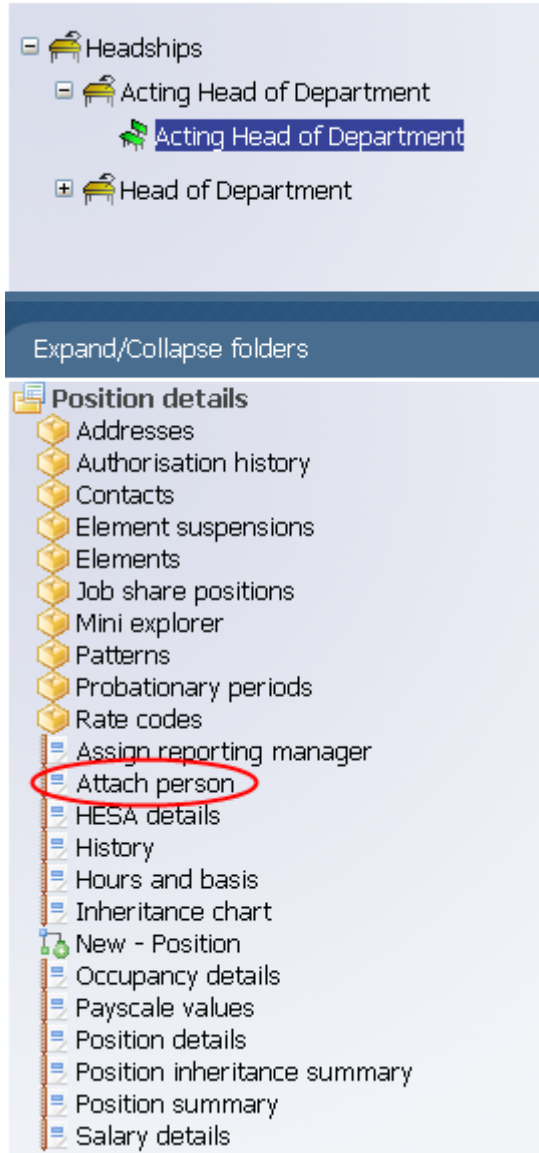
A screenshot of the 'New - Position' form. The form has a title 'New - Position:' and two input fields: 'Name' with the value 'Acting Head of Department' and 'Quantity' with the value '1'. A green 'Save' button is located at the bottom of the form.

4. Click on Save
5. Trent adds the new position to the organisation structure and the mini explorer diagram is updated accordingly to show the vacant position (displayed as a green chair).



1.3 Attaching a person to a position

1. Select the newly created position (green chair)




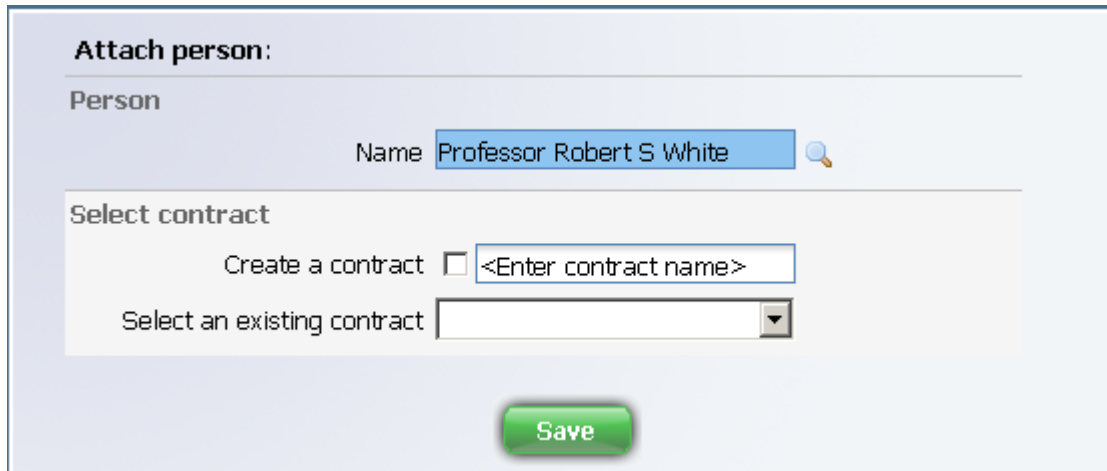
2. Click on the attach person option in the Action Pane.
3. Enter the correct effective date

Attach person: New

Person


Name

4. Click the search icon  to search for the person by name. Once the person has been selected further details on the attach person page are displayed.



Attach person:

Person

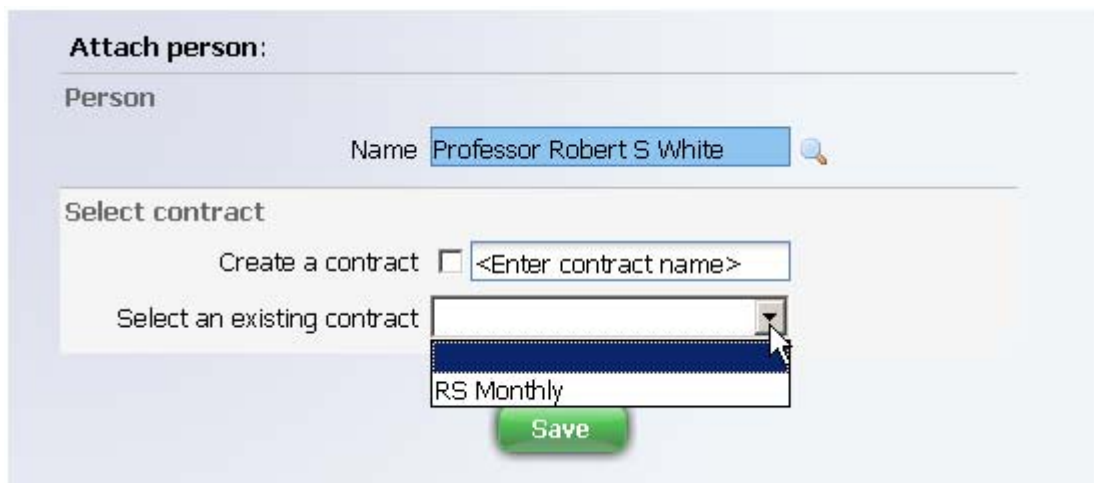
Name 

Select contract

Create a contract


Select an existing contract

5. Do not enter anything in the create a contract field. Click the drop down arrow to the right of select an existing contract and select the contract name.



Attach person:

Person

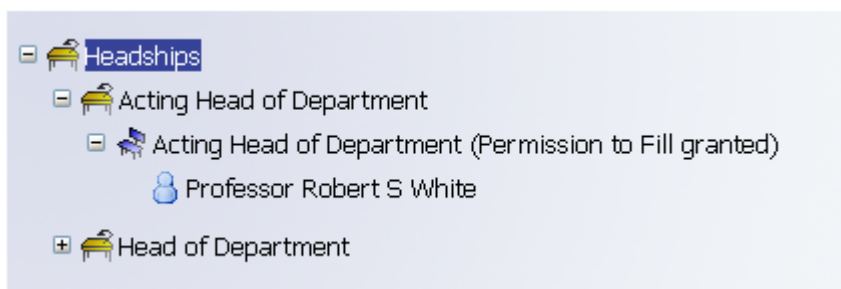
Name 

Select contract

Create a contract

Select an existing contract

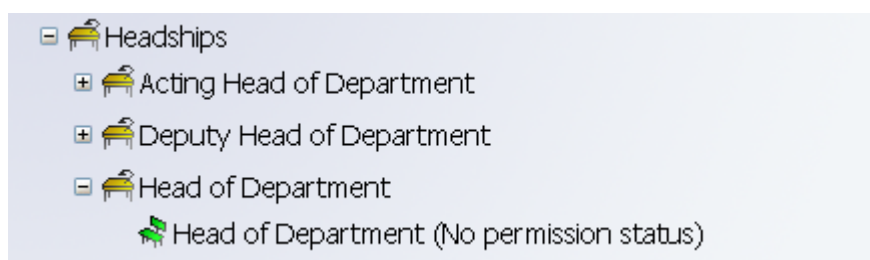
6. Click on Save.
7. You will see the person attached to the position in the mini explorer diagram



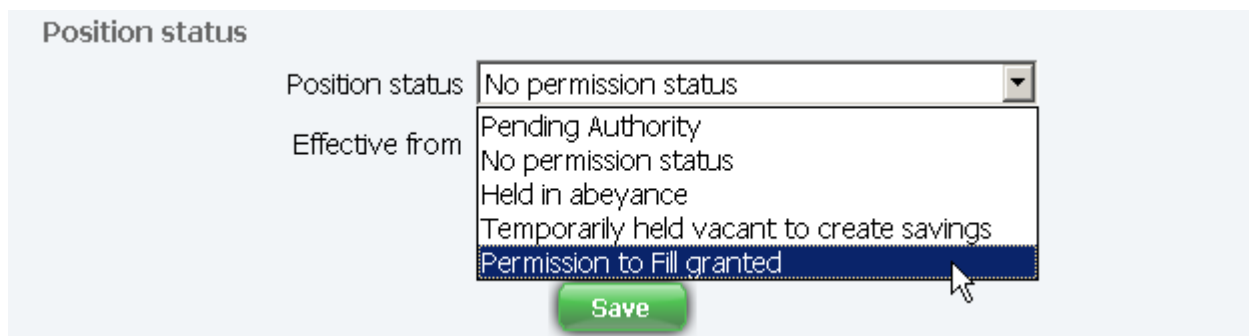
1.4 Changing Permission to fill status

The permission to fill status for a new position will automatically be set to permission to fill granted (you may have to wait for this authorisation process to complete before you can attach a person). Once a person is attached the permission status will automatically change to no permission status.

Where you are attaching a person to an existing Head of Department Position, or Acting Head position, the permission status will need to be changed from No permission status to permission to fill granted before you can attach the person.



1. Select the position.
2. Select position details
3. Enter the effective date
4. Click the drop down arrow to the right of Position Status.



5. Select permission to fill granted.



6. Enter the effective from date and click on the Save button.

1.5 Hours and Basis Information

Hours and Basis information will usually be inherited for any Headships or Acting Headships that are created within an existing Headships level 1 post. However where a new department is created, or where a new level 1 post of Headship is created the Hours and Basis information should be completed as below.

Hours and basis: Head of Department (No permission status)

Contractual Hours II

FTE hours II

Post budgeted hours II

Annual weeks worked II

Employment is term-time only

Category II

Basis II

Type II

Change reason

FTE details

Override FTE calculation

FTE value

2 Limit of Tenure

Where an appointment has a limit of tenure this information this should be recorded as part of the position details.

1. Select the position from the mini explorer diagram
2. Choose Position details



3. Enter the effective date. The position details screen will be displayed.

Position details: Acting Head of Department

Job title

Start date 06/03/2009

End date change

End date

Position reference 70006453

Probationary period

Location

Structure workflow group

Occupant Professor Robert S White

Reporting unit Department of Earth Sciences

Reports to

Professor James A Jackson (06/03/2009 -)

Expected position end date

Expected position end reason

Structure group 1

Structure group 2

Position status

Position status

Effective from

4. Enter the expected position end date with the date format of DD/MM/YYYY or use the calendar popup button.
5. Select the expected position end reason from the dropdown list (if appropriate reason exists)
6. Click on Save.

Note: these fields are for information purposes only, they are used for reporting purposes and are available using the Advanced Search. The employee will need to be entered as leaving the position (and an end date entered for the post where the post is also ending) when the occupancy comes to an end.

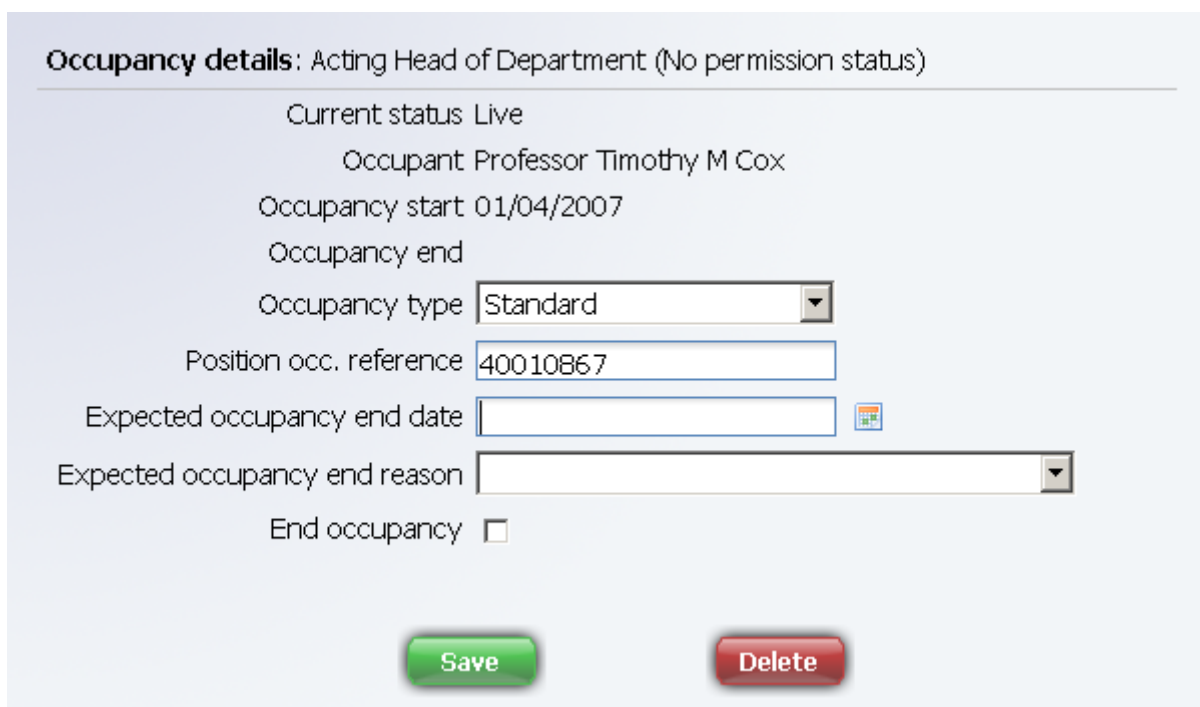
If the expected position end date is being entered separately to the post and position set up, the position details screen can be accessed by selecting the employee first.

Navigate: **Organisation > People (Select a person) > Employment > Positions > Position details**

2.1 Occupancy Limit of Tenure

Where an appointment has a limit of tenure it is also necessary to enter expected occupancy details for the position. In many cases the occupancy end date will be the same as the position end date, but it is possible that the position can have an end date and reason that is different to the occupancy end date and reason, or that there is an occupancy end date only. Where a position does not have a limit of tenure, but the individual does e.g. Headships and visa/work permit scenarios, an expected occupancy end date should be entered.

1. Select the position in the mini explorer diagram.
2. Choose Occupancy details
3. Enter the effective date
The Occupancy details screen will be displayed



Occupancy details: Acting Head of Department (No permission status)

Current status Live
Occupant Professor Timothy M Cox
Occupancy start 01/04/2007
Occupancy end
Occupancy type Standard
Position occ. reference 40010867
Expected occupancy end date
Expected occupancy end reason
End occupancy

Save Delete

4. Enter the expected occupancy end date and occupancy end reason
5. Click on Save

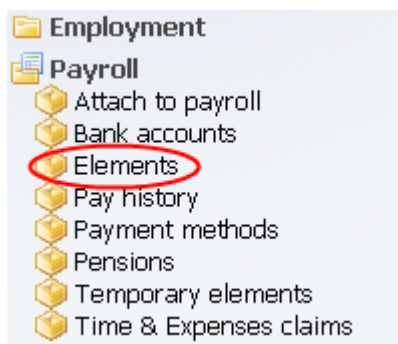
3 Adding permanent Elements

Elements are part of someone's pay and can include allowances or deductions. The term permanent just means that is received/deducted on a regular basis.

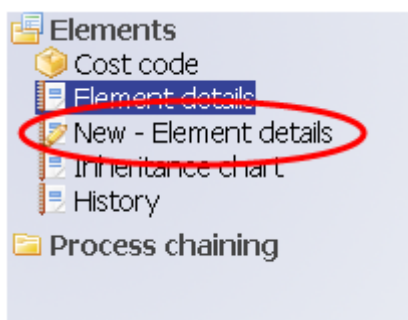
For Headship payments the element is attached to the persons permanent position (for example their position as Professor) **NOT** to the position of Head of Department or Acting Head.

All elements to be attributed to an employee are attached using the New – Element detail.


1. With the University of Cambridge selected, click on the People menu in the Action pane.
2. Search for the person using surname or person number if known. Select the person record.
3. Select the payroll menu, and then select Elements.



4. Existing elements (which will always include Basic pay, which is an inherited value) will be displayed in the object pane. From the elements menu select New – Element detail.



5. Select the Level at which the element should be attached from the drop down list. This should be the persons permanent position (in this example their position as Professor) **NOT** the position of Head of Department or Acting Head.


Level 


Start date


End date





6. Enter the start date for receiving the element.
7. If the element is to be paid for a set period of time enter the end date for receiving the element.
8. Select the element from the drop down box on the Element field. (NP stands for non-pensionable)
9. For a cash based element enter the annual cash amount of the allowance in pounds and pence.

Level 

Start date 

End date 

Element  

Element type

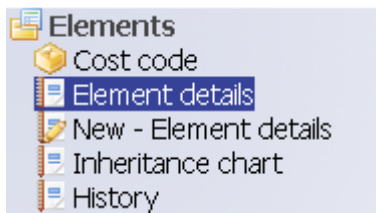
Cash

10. Click the Save button. The new element will be displayed in the object pane.

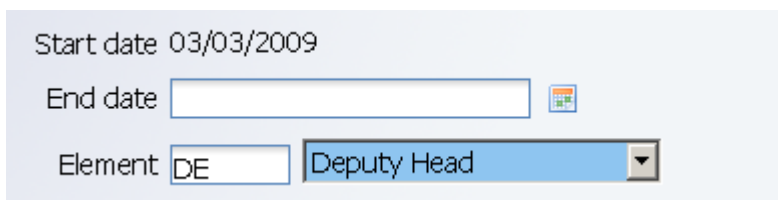
Select all						
Element	Start date	End date	Occupancy start	Occupancy end	Cash	Units
 Basic Pay	07/02/1989					
 Basic Pay	06/03/2009					
 Acting Head/Director	09/03/2009				11,201.04	

3.1.1 Viewing element details

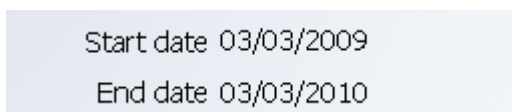
Details of any elements that are applicable to an individual can be viewed by selecting the appropriate element and choosing Element detail



Where no end date for the element has been specified, this will remain a field which can be amended.





Once an end date has been entered and saved, these dates appear, but cannot be amended without re-entering the element details.



3.1.2 Changing the end date of an element

1. With the University of Cambridge selected, click on the People menu in the Action pane.
2. Search for the person using surname or person number if known. Select the person record.
3. Select the payroll menu, and then select Elements.
4. The elements for the person will be displayed in the object pane.
5. Select the element for which you wish to change the end date and if required choose Element detail to view the current details.

Element	Start date	End date	Occupancy start	Occupancy end
 Deputy Head	03/03/2009	03/03/2010		
 Basic Pay	01/10/2003			

Expand/Collapse folders

Elements

- Cost code
- Element details**
- New - Element details
- Inheritance chart
- History

6. Select New – Element detail and re-enter the details of the element as previously but with the new end date.

Level

Start date

End date

Element

Element type Payment

Cash

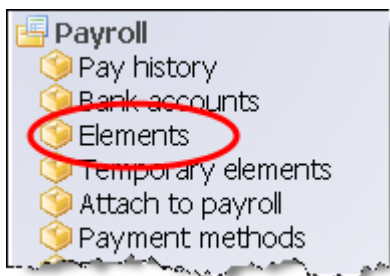
7. Click on the Save button.
8. This will overwrite the original entry so that the end date is changed.

3.2 Element Costing

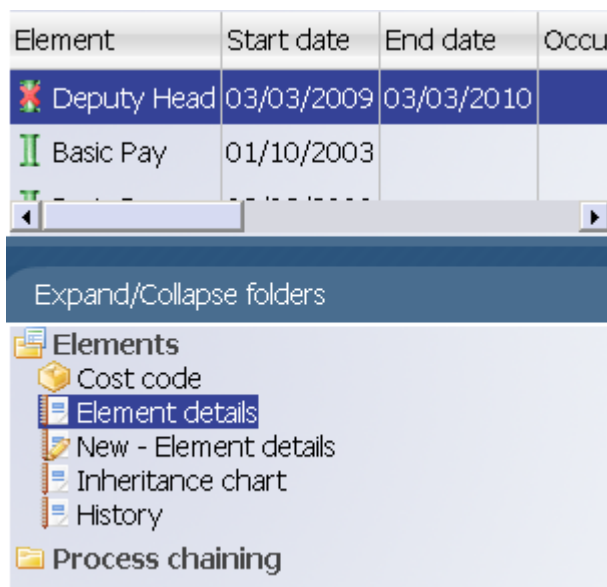
The element will be costed to the employees 'home' cost centre(s) as default.

If the element is to be to a different cost code than basic pay this needs to be actioned through **People > Payroll > Elements**

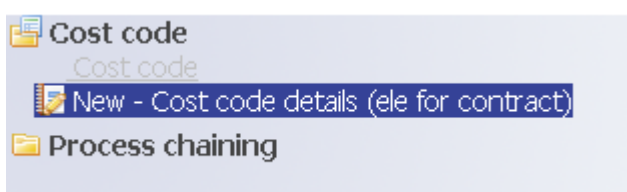
1. With the University of Cambridge selected, click on the People menu in the Action pane.
2. Search for the person using surname or person number if known. Select the person record.
3. Select the payroll menu, and then select Elements.



4. The existing elements for the person will be displayed. Select the element that requires the costing to be changed.



5. Select Cost Code, and New – Cost code details (ele for contract)



6. Select the Rule (there's only one, UC1) from the drop down box

Cost code details: New

Credit/Debit



Rule

Length 24

Cost code

Percent

Value

Apportion costs  

Override

7. Fill in the Cost code for the element
8. Percent should be set to 100
9. Value is left blank in most cases.
This can be used if you wish to cost a set amount of a payment elsewhere (i.e. employee gets £500 allowance and £200 of it is funded by another dept regardless of whether the £500 changes)
10. Apportion costs is not used, leave this field blank
11. Override should be ticked as this then ensures that any additional values entered against this element are costed to the same place (i.e. backpay)
12. Click the button.

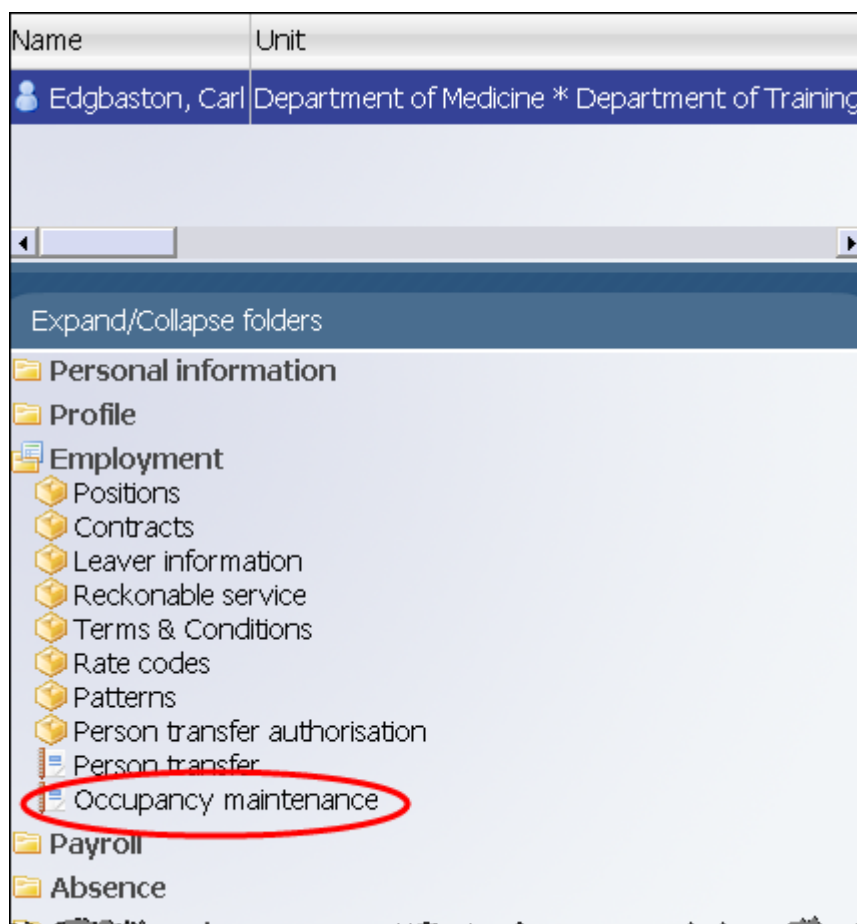
4 Occupancy Maintenance

Occupancy Maintenance enables you to enter leaving details against one or more selected positions that an employee holds.

This option is required where a person holds two positions simultaneously, such as Professor and Head of Department, and their position as Head of Department is to end but they are still to be employed as a Professor.


Navigate: Organisation > People (Select a person) > Employment > Occupancy Maintenance


1. Use the search facility to find the person.
2. Select the Employment folder and then Occupancy Maintenance




3. Enter the effective date


4. In the occupancy details all positions that the employee holds will be shown. Select the tick box for the position that the employee is leaving. (Ticking University of Cambridge will automatically tick all positions held, so **DON'T** select this option!)
5. Enter the leaving date when the person will leave the selected position
6. Select from the drop down list the reason they are leaving.


 This person will leave any organisation, contract or position selected.


Occupancy maintenance: Professor Carl F Edgbaston 

Leaving details

Leaving date 





Last working day 

Last payment date 

Reason for leaving 

Exit interview complete

Occupancy details

	University of Cambridge	<input type="checkbox"/>
	C F Edgbaston	<input type="checkbox"/>
	Deputy Head of Department (70004753)	<input checked="" type="checkbox"/>
	Professor (90000086)	<input type="checkbox"/>

7. Click on the Save button.

4.1 Entering an End Date for a Post

Where an employee leaves a position due to limit of tenure, their occupancy of the position should be ended, and where no future person is to occupy the position an end date for the Post should be entered. Entering an end date for the Post will automatically also end the position.

1. Use the search facility to find the post (use Organisation Explorer)
2. Select the correct post
3. Choose Post details

Post details: Deputy Head of Department

Post Deputy Head of Department

Start date 03/03/2009


End date change


End date


Post reference 50003555

Current status Live


Job share


Suspend from 


Suspend to 

Probationary period  II

Location II


Structure workflow group  II

Structure group 1 School of Clinical Medicine  II

Structure group 2 Contract team B  II

4. Click in the end date change tick box and the end date field will be displayed.

End date change

End date 

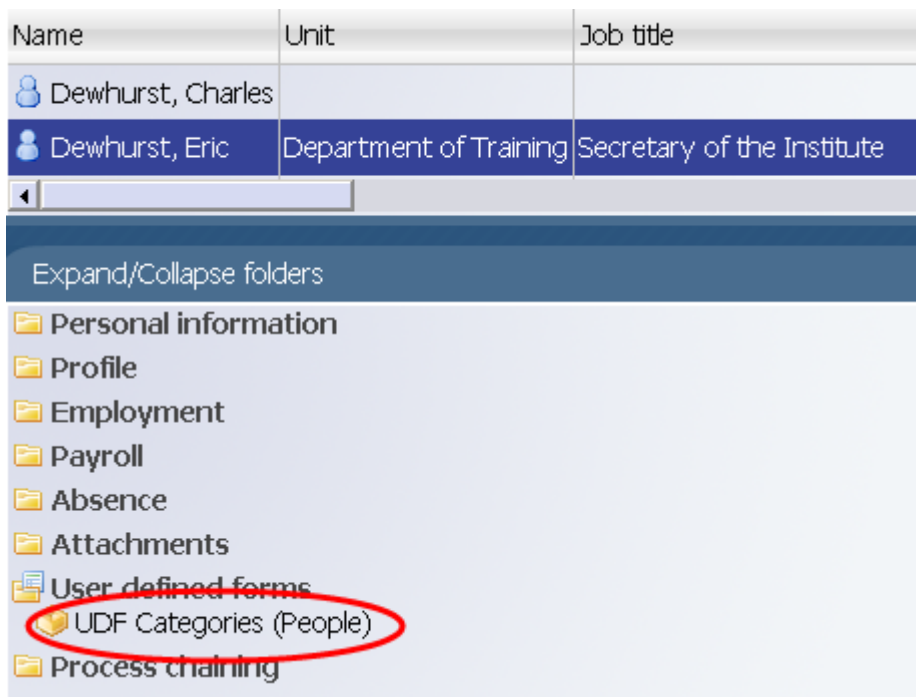
5. Enter the end date of the Post
6. Click on Save

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.

5.1 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.

Suppress Regent House Mailings	Roll Year	Roll Member	Membership override
No	2006	Yes	No override

Expand/Collapse folders

- UDF Details
 - UDF Details (People)
 - New - UDF Details (People)
- Process chaining

UDF Details: Personal Roll Details - Mr Eric B Dewhurst

Suppress Regent House Mailings

Roll Year

Roll Member

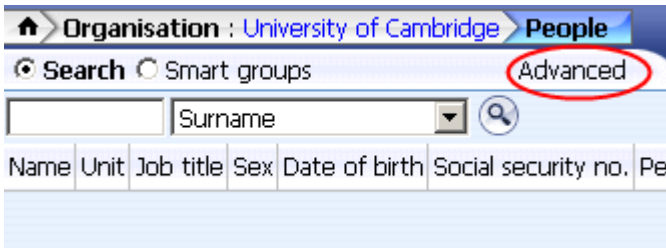
Membership override

Comments

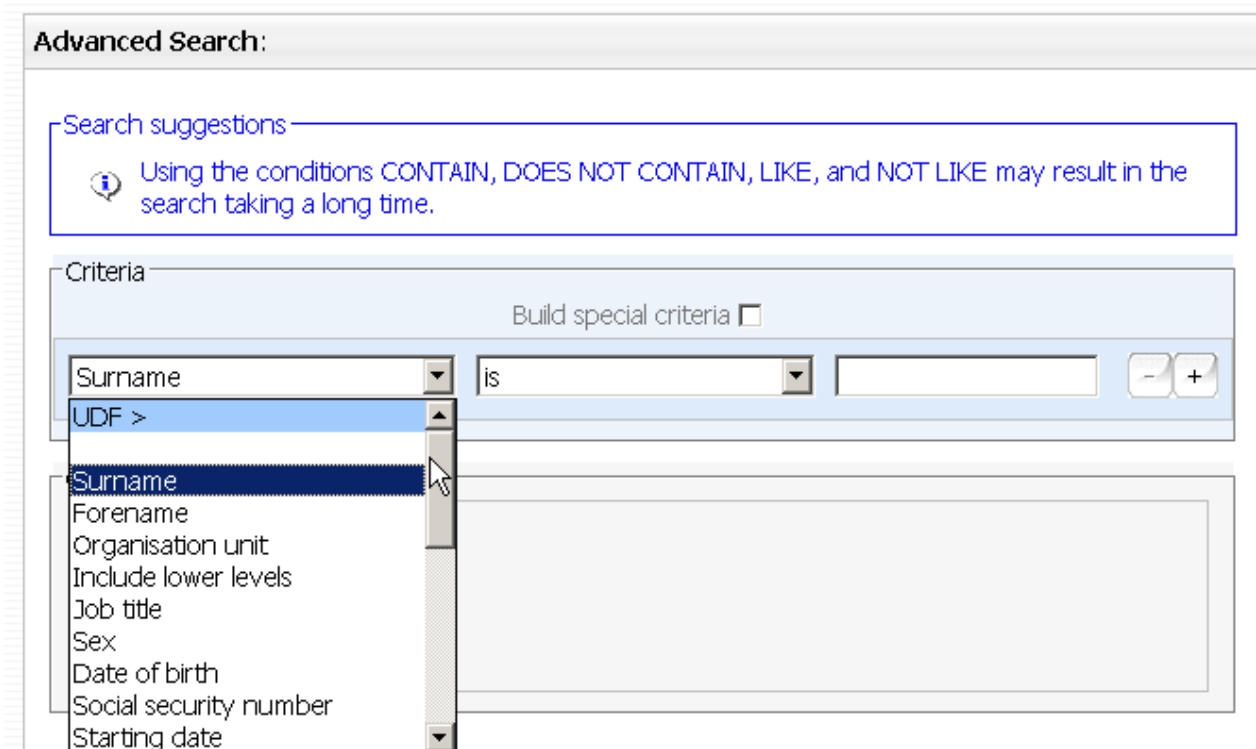
5.2 Searching by UDF

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

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

UDF > Click for subfields is

Output options

Generate batch

Save as smart group

For Trent For export

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

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

UDF > Click for subfields

UDF > Click for subfields

Removal Expenses Eligibility >

Red circle status >

Personal Roll Details >

Personal Faculty Membership >

Payroll URN >

Pay & Grading autoincrement protection >

Name for Roll of Regent House >

GMC Registration no >

DP Amalgamation >

Contract Sent >

College Membership >

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

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

Red circle status > Click for subfields is

Output options

Generate batch

Save as smart group

For Trent For export

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

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

Red circle status > Click for subfields is

- Red circle status > Click for subfields
- Status
- Date start
- Date end
- Personal Roll Details >
- Personal Faculty Membership >
- Payroll URN >
- Pay & Grading autoincrement protection >
- Name for Roll of Regent House >
- GMC Registration no >
- DP Amalgamation >
- Contract Sent >

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

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

Status

Output options

Generate batch


Save as smart group

For Trent For export

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

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

Advanced Search:

Search suggestions
 Using the conditions CONTAIN, DOES NOT CONTAIN, LIKE, and NOT LIKE may res the search taking a long time.

Criteria
Build special criteria

P&G autoincrementation protection	True
-----------------------------------	------


Output options
Generate batch
Save as smart group
 For Trent For export

Search

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

Output options

Generate batch

Save as smart group

For Trent For export

6 Reports

There are two Cognos reports regarding Red circle status which can be run via the helpdesk. Red Circle statistical Report and Red Circle Status Listing. The Red Circle Status Listing lists by Department all red circle people with their personal reference, name and position, the Red Circle Status Start date and End date.

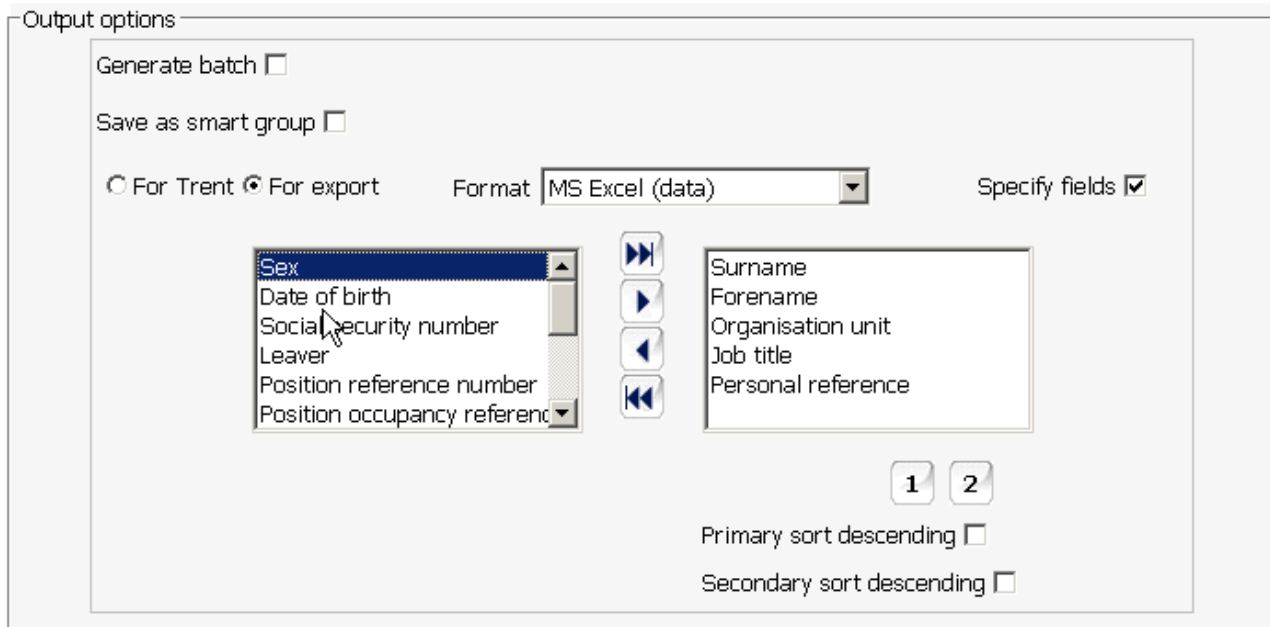
Academic Division

Personal Reference	Formatted Name	Position	Red Circle Status Start	Red Circle Status End
10006201	Mr CA Belcher	Administrative Officer Grade II	1 Oct 2007 00:00:00	
10100757	Mrs JS Milne	Chief Secretary (Personal Assistant)	1 Jul 2007 00:00:00	
10003399	Dr MS Edwards	Principal Assistant Registry	1 Jan 2006 00:00:00	
10001104	Mrs JR Collis	Senior Secretary	1 Jan 2006 00:00:00	
10001261	Mrs PGE Dunwell	Senior Secretary	1 Jan 2006 00:00:00	
10079492	Mr A Gordon	Site Development Manager	1 Jan 2006 00:00:00	
Academic Division			6	

It is possible to create your own “reports” for UDF data by making use of the export facility within the Advanced Search.

When you specify an Advanced Search with the output going to a specific file type you also have the option to specify the fields to be used, thereby creating your own simple report.

When you click the specify fields option you will be shown all of the available fields and given the tools to build your own customised list.



Output options

Generate batch

Save as smart group

For Trent For export Format: MS Excel (data) Specify fields

Sex
Date of birth
Social security number
Leaver
Position reference number
Position occupancy referenc

Surname
Forename
Organisation unit
Job title
Personal reference

1 2

Primary sort descending

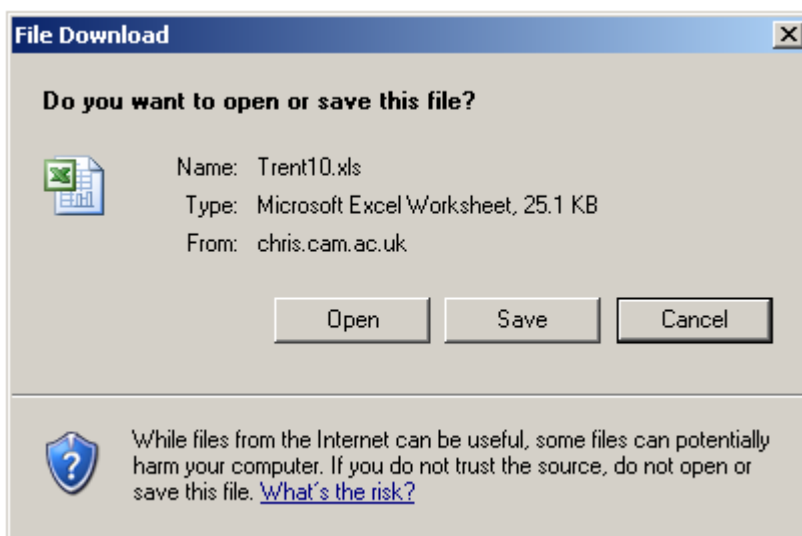
Secondary sort descending

Select the fields that you require from the left panel and use the buttons to copy them to the selected list on the right.




will move the highlighted item from the available list to the selected list.

Trent will open another window and when the search has completed the open dialog box will be displayed. Click the Open button to display the data.



File Download

Do you want to open or save this file?

 Name: Trent10.xls
Type: Microsoft Excel Worksheet, 25.1 KB
From: chris.cam.ac.uk

Open Save Cancel

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)