CHRIS – Introduction Guide

1 Introduction

The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called **C**ambridge **H**uman **R**esources **I**nformation **S**ystem (CHRIS).

This guide provides information to help you learn about navigating your way through the iTrent Human Resources Management and Payroll system.

1.1 The Login screen

Locate the iTrent icon on your desktop.

When you click on the shortcut, the page shown below will be displayed

Select the "Login (managers and administrators)" link, and then click on" log in"

HR If you are a registered CHRIS user, please **log in**.

The Raven Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the 'Submit' Button.

UNIVERSITY OF CAMBRIDGE

Raven Authentication Service

University of Cambridge > Computing Service > **Raven**

The web resource you requested requires you to identify yourself [help]. This resource calls itself '**Trent (hr_live)**' and is provided by the website chris.cam.ac.uk. You should only proceed if you are happy to be identified to this site.

User-id: [   ]
Password: [   ]

☐ override login options for this session?

[Submit] [Cancel]
[help]

Always quit your web browser when you have finished accessing services that require authentication. Do not disclose your Raven password to anyone and only enter it on web pages with URLs that start https://raven.cam.ac.uk/. Please report attempts to obtain your password by other means.

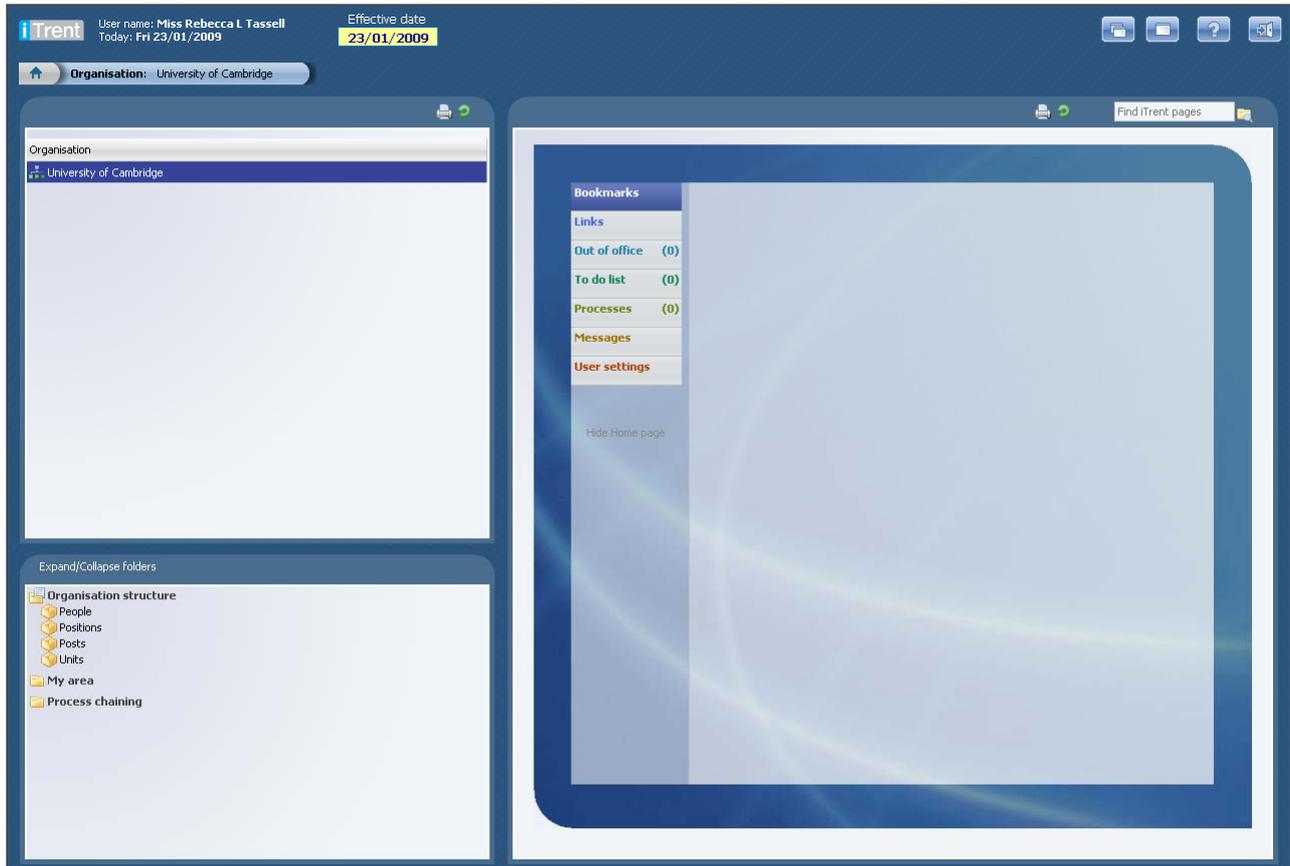**UCS** The Raven web authentication system is provided and managed by the University Computing Service.
© 2007 University of Cambridge Computing Service

A progress message will be displayed as your data is retrieved:

38% Loaded
Retrieving user data

1.2 The iTrent Home page

When you first logon to iTrent the Home Page will be displayed:

You can return to the Home page at any time by clicking on the Home icon at the start of the navigation trail.
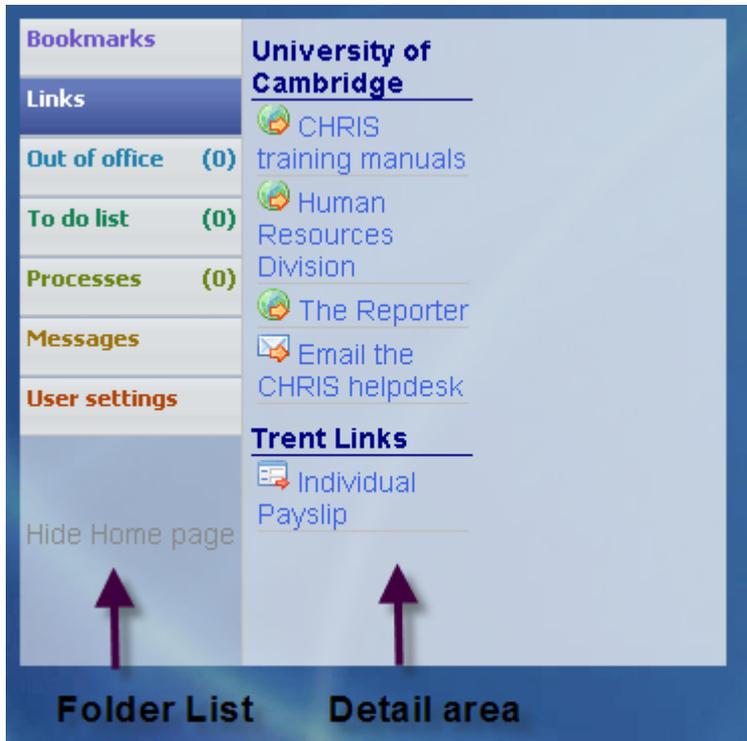

Or

Click the Home page icon which is displayed at the top right of iTrent pages. For example:

The Home page is made up of two areas: the folders list and the detail area

The list of folders and the order that they are presented are controlled by the pages; Link Section, Bookmark folder and Bookmark details which are described later.

iTrent will always have sections for the To do list, Out of Office, Processes, Messages and User Settings.

You can create your own sections as required which can be configured to hold one of more folders into which you can place iTrent actions, External web site addresses or Email addresses. For example you may create Bookmarks of iTrent pages and have these held in folders.

The Home page folder list will also display how many items are requiring your attention. For example:

This example shows that there is 1 person Out of Office today and 1 Process that has been performed.

1.2.1 Out of Office

This section will list all the people from your reportees (those who have you set up as their reporting manager) who have been identified to iTrent as being out of office. The default is set to Today.
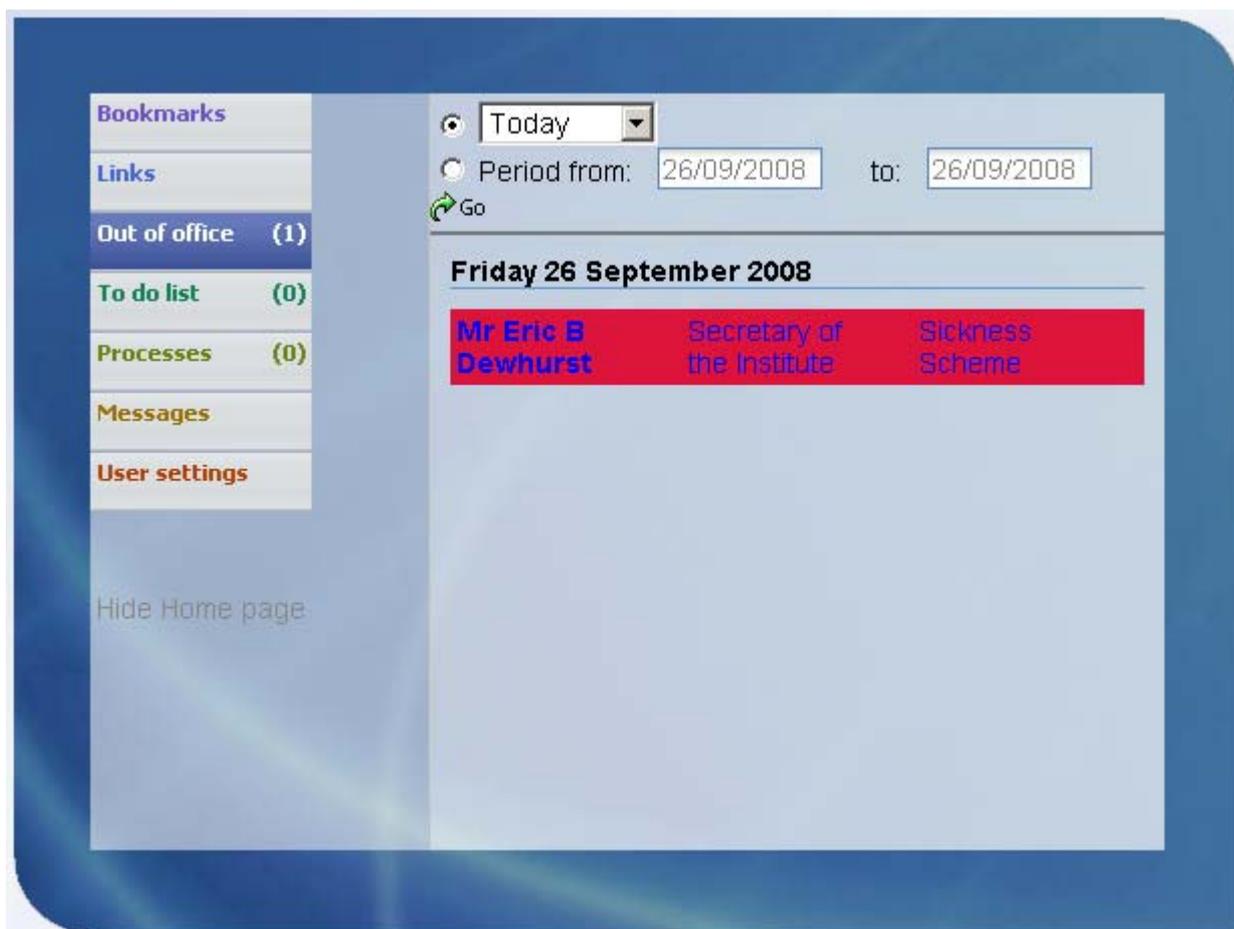

People are identified as being out of office by having an Absence recorded in iTrent. Absences are displayed in day of the week order and are colour coded to indicate the type of absence. Each absence lists the name of the person, their position ands the type of absence.

You can modify the display using the controls at the top of the page. The drop down list enables you to select Today, Tomorrow, This week and Next week. Alternatively you can select to display a specific date range using the Period form and to date fields. If you change the selection you should then click the refresh icon ⟳ Go to have the data displayed.

Each row displayed is also a hyperlink and when clicked will display the Absence calendar, containing the people in the same unit as the person selected.

1.2.2 Default User Preferences

This page displays user preference settings, some are set as defaults and some can be changed as personal settings.
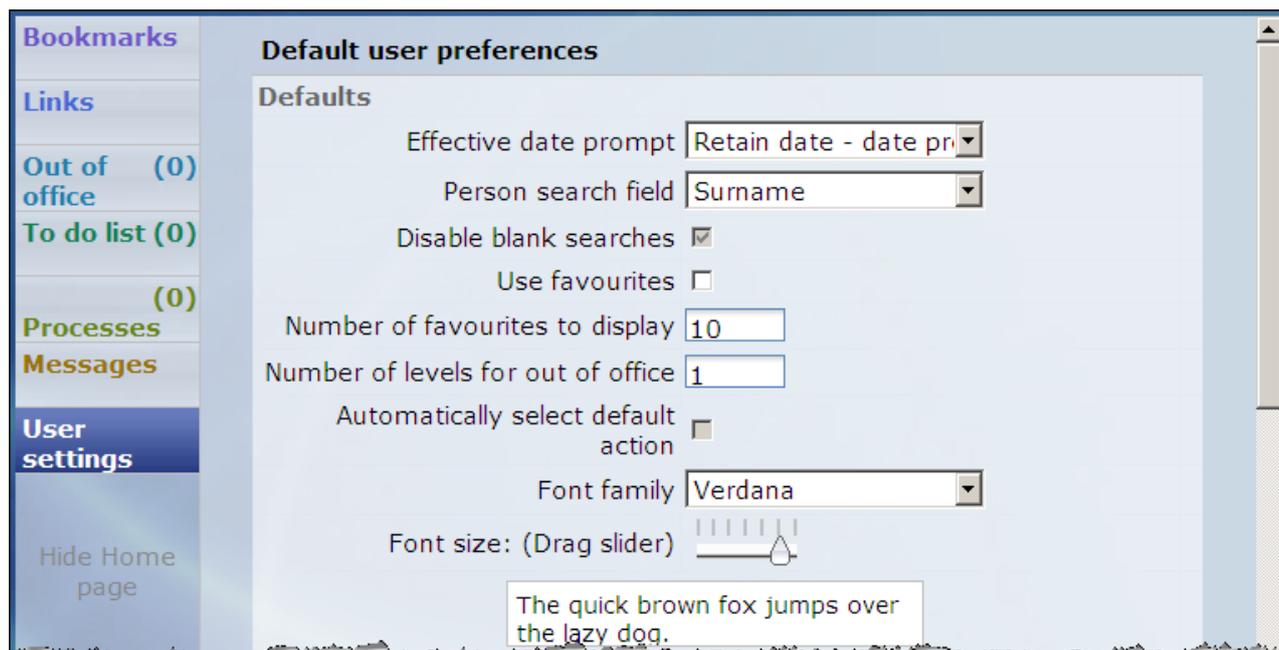
Effective Date Prompt	You have the option to select whether or not to retain the last effective date you used, to save you continually re-keying the date when moving from one form to another.
Person search field	Specifies which item is to be used as the default for people searches.
Use favourites	The default setting is not to use favourites. Menu options for departmental access are restricted to only those of relevance at departmental level. When ticked this option will show the most recently used navigation items rather than the complete list.
Number of favourites to display	Sets the maximum number of your favourites to display.
Font Family	Sets the font to be used.
Font size	Sets the font size
Mandatory Field colour	Sets the mandatory field colour
Show tooltip in searches	Allows summary data to be displayed when the cursor is moved over the search results

1.2.3 Bookmarks

iTrent pages may be bookmarked by clicking the Bookmark icon ▣ that is displayed at the top of each page.
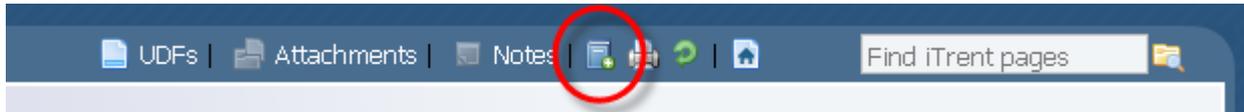
This facility is restricted to pages that you can access via the navigation. The Advanced search page, for example is not available to be bookmarked as it is not a navigation item.
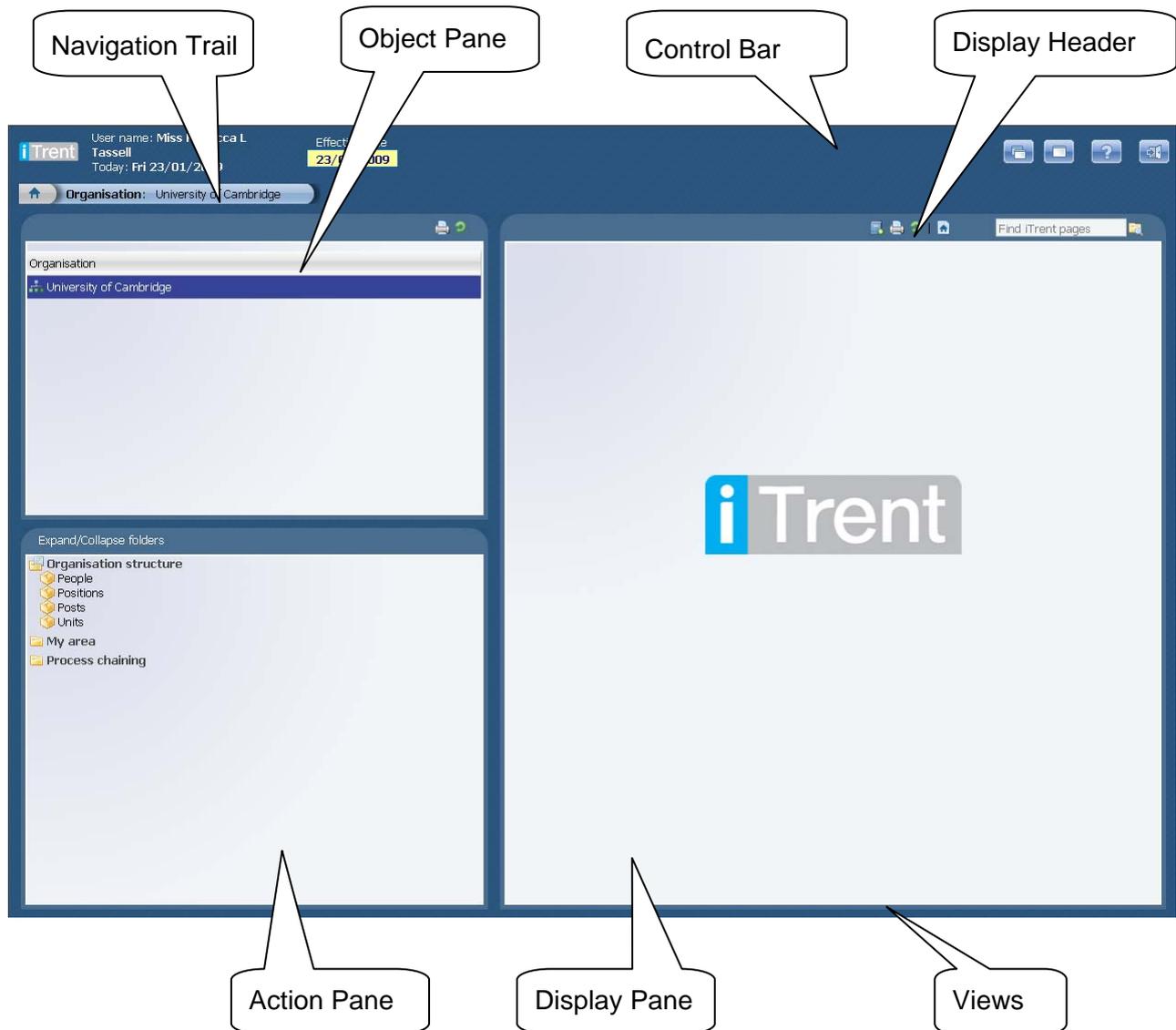
When you click the Bookmark icon the Add link page is displayed which allows you to define the bookmark.

You can bookmark iTrent actions, external web pages and email addresses.

Currently this option is only available to users with update access.

1.3 The iTrent Screen

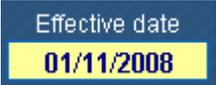The iTrent screen is divided into several different areas. These are described in detail in the following pages.

Navigation Trail   Object Pane   Control Bar   Display Header

Action Pane   Display Pane   Views

The Control Bar

Item	Action	Keyboard Shortcut	Information
User Name			The username you have logged on with
Today			Today's Date
Effective date 01/11/2008	Effective Date	Alt + E	Many of the processing tasks within iTrent require an effective date to be logged. This field allows the user to set the required date before adding or changing a record. In addition it will allow the user to view details 'as at' the date set in the field.
	New View	Alt +N + Enter	When this is clicked a new view is created. The tabs to access the views are displayed at the bottom right of the screen.
	Full View		When this is clicked the Navigation Pane is toggled between being removed or displayed and the Display Pane is expanded to the full screen.
	Help	Alt + H (Enter)	When this is clicked you will be presented with the online help.
	Log Off		When this is clicked you will log off from iTrent. (Note this icon does not appear for users accessing iTrent via Firefox. Firefox users will need to logout by closing the browser window / tab, not by clicking the icon)

1.3.1 Navigation Trail

This bar shows how you navigated to the current location. Each new level creates a new entry in this list. As you make selections in the various panes, the navigation trail will update to indicate the selections you have made. The trail is made up of individual items, each item is split into a header (**bold text**) and contents (normal text).

1.3.2 Object Pane

This area displays the objects upon which your actions will be performed. It is also used to hold search results. The actual content of the object pane will depend on previous selections you have made.

You can sort the displayed information of any table by clicking on the required heading.

1.3.3 Action Pane

This area shows you the navigation options that are available to you. These will vary depending upon the current object that is selected and the configuration of your user profile.

Items that have a Sub Folder icon next to them indicate that you will be given further navigation options relating to this level when you click the item.

Items that have a page icon next to them indicate that you will go straight to the relevant page when you click the item.

Items that have a page with a yellow pencil icon next to them indicate that you will go to the relevant page and be able to enter new information when you click the item.

Items that have a folder next to them indicate that a group of items and or pages have been grouped together into a folder. The folder is opened when you click on the item, additional items are then displayed.

1.3.4 Display Pane

This area shows you the details for the selected task. This area will usually display a page where you can display amend or delete data. (Depending on your user profile)

Departmental profiles are currently read only. You cannot update this information.

1.3.5 Display Header

The contents of the display header will vary depending on the current contents of the display pane. The possible buttons are:

Sends the page from the Display Pane and the Objects Pane to the selected printer.

Attachments Lists details of any attachments to the page selected in the display pane.

Notes Displays the contents of the notes page associated with the display page.

UDFs Displays user defined fields associated with the display page.

These buttons appear coloured when information has been entered

1.3.6 Views

If you click the New View icon, iTrent will create a view for the task you have performed. A view is made up of the navigation trail, object pane and display pane as they were at the time you clicked the new view icon in the control pane.

The tabs to access the views are shown at the bottom right of the Display Pane.

You can create up to 6 views.

This feature will help you perform repetitive tasks that use several action pages or to hold parallel information that you may need to refer to.

Click to the right of the tab to close the view.

1.4 Screen Time out

If there is a period of 1 hour inactivity whilst using iTrent then when you next attempt to access data the following message will be displayed.
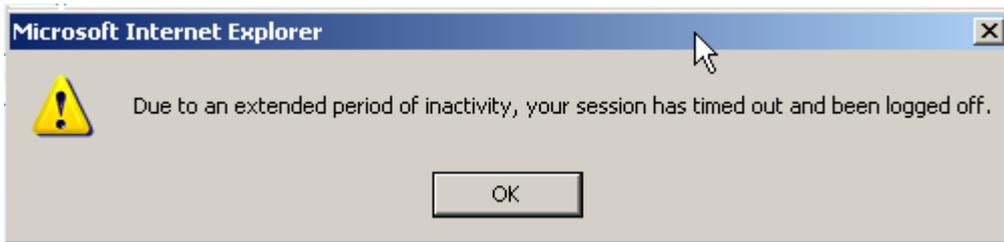
Please note that any unsaved data will be lost.

1.5 Resizing Areas

You can resize the areas of iTrent by moving the cursor to a dividing edge and letting the cursor change into a double arrow. Hold the cursor down and adjust accordingly.
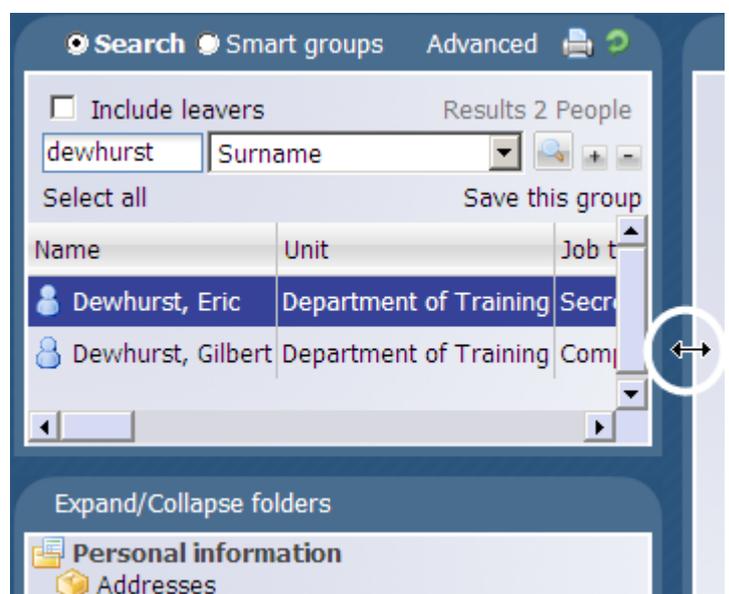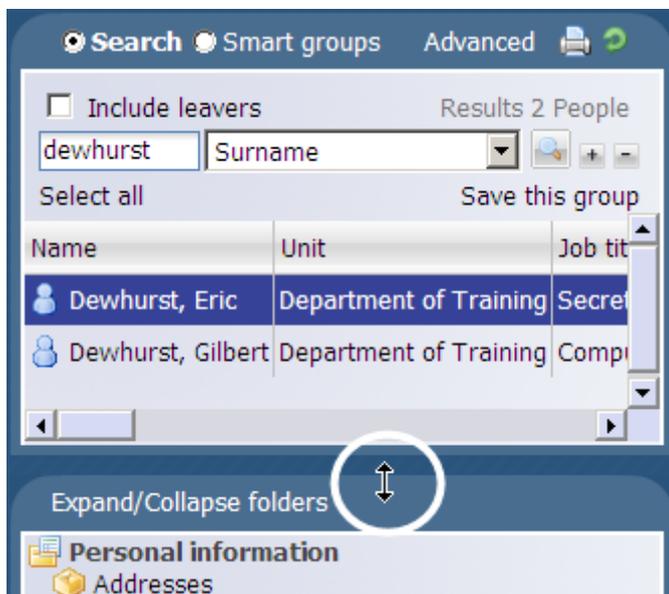
Vertical adjustments will show this cursor:

Horizontal adjustments will show this cursor:

Help and Documentation

1.5.1 Activating Help

On-line help is provided within iTrent. To access help click the help button [?] on the iTrent control bar. iTrent Help cannot be accessed by pressing the F1 key as this will initiate the on-line help for the Internet Explorer Browser.

When you click the Help button the width of the iTrent screen will be reduced from the right and the iTrent on-line help will be started in a separate window next to the iTrent application. If required you can resize or reposition either the iTrent screen or the Help screen as required. When you close the on-line help, the iTrent screen will resize itself back to its original settings.

1.5.2 Controlling Help

The following buttons are available on the help toolbar.

Button	Action
	Displays the iTrent Help contents navigation tree in the navigation pane.
	Displays the iTrent Help Index and search input field in the navigation pane.
	Opens the iTrent Help search keyword input field in the navigation pane.
	Opens the iTrent Help glossary topic list in a new external window.

2 Navigation

The navigation trail shows you where you are in the iTrent Navigation. Each new level creates a new entry in this list.


This trail shows the way in which information has been grouped and allows you to move between these groupings.

Each entry is also a link, which enables fast access back up the hierarchy.

2.1 Navigation Trail

The items shown on the navigation trail in black and bold are the navigation items that you have selected (Organisation, People, Addresses). The items in blue show the current selection within the navigation item (University of Cambridge, Brown, Amber). You can click on any of the items shown in the list to revert back to that point and then to select another action or object as necessary. You can also use the left and right arrow keys on your keyboard to locate an item in the navigation trail. The selected item will appear with a blue background. If you click on **People** (or any of the items in bold black) on the navigation bar, the display will revert back to your original selection or search results (the items to the right of People will be removed) and you can then select another employee and an action to perform against the employee:
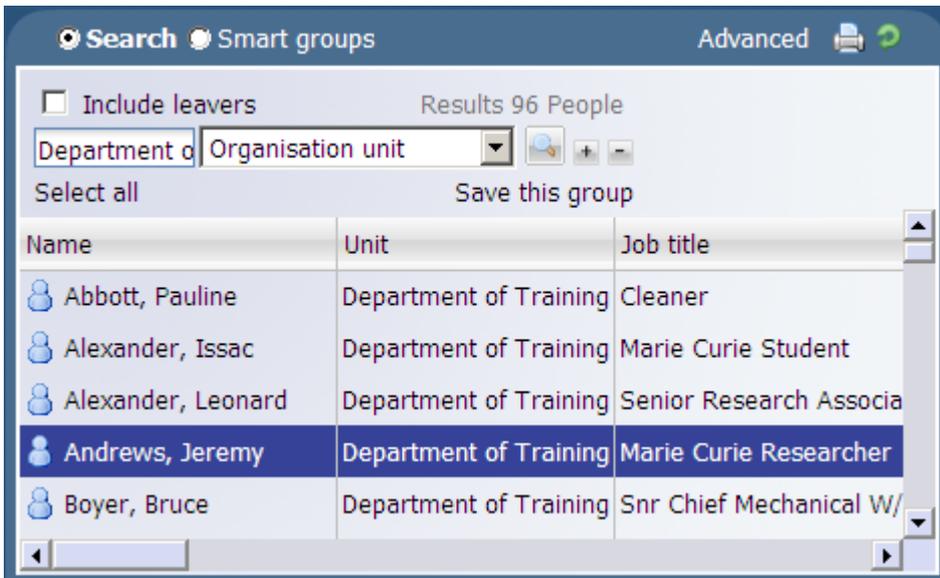
Alternatively you can right click, on any of the blue items in the list. This will show you the list of the current selection made within the navigation item. For example if you right click on the employee name, Andrews, Jeremy, you will be shown a list of all the other people from your initial search. You can then select another employee from the list and continue processing. In this example you could click on Brown, Amber, the next person in the list and input her address details.
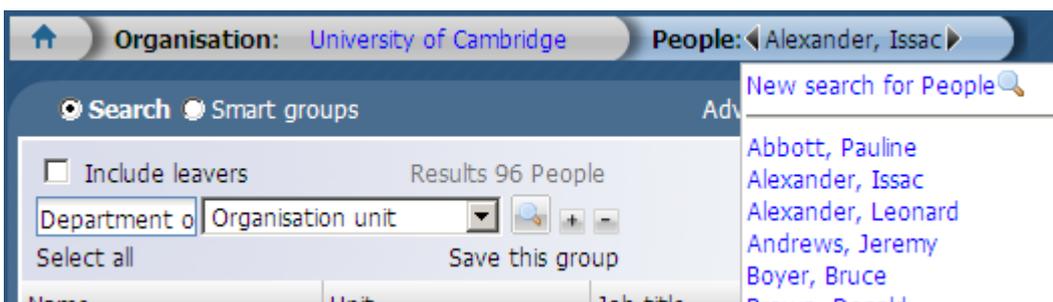
You can also use the navigation trail to scroll up or down a list of items in the search results. You can move sequentially through the list by clicking the left or right arrow to display the details for the next or previous item.

If you right click on any of the black and bold items in the navigation trail for example, **Addresses**, you will see a list of other functions you could perform against the selected employee.
The actual functions available to you are determined by your user profile.
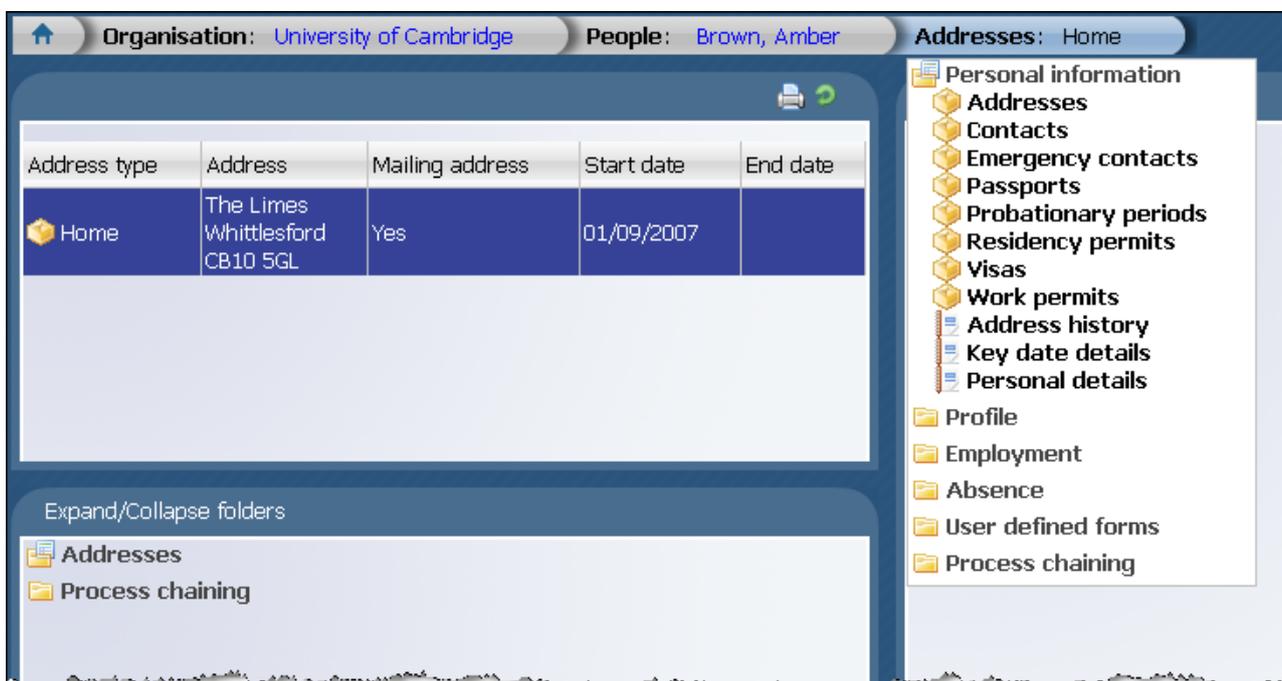
If you click on Emergency contacts for example, iTrent will then display the Emergency contacts folder enabling you to view existing details.

3 Action Pane

The action pane is used to select an action to be carried out on an object previously selected in the object pane. The available navigation items will vary, dependent on your previous selections.

If you have enabled Favourites (selected in User Settings) then the top items in the list will also reflect your previous choices. Previously selected items will appear at the top of the list. To access items which you have not recently used you may have to click ⌄ at the bottom of the list to reveal all of the available items.

The type of action is illustrated by the icon to the left of the item label as shown below.

Button	Action
📁	The Folder icon indicates that additional actions can be displayed when you click the folder. These will be similar actions grouped together under a single folder.
📦	The Sub Folder icon indicates that there are further items of detail required before a page can be displayed. For example, if you click on the People Sub Folder: Then iTrent will display the Search page in the Object pane enabling you to select an existing person or use the New – Personal Details page to enter new details.
📄	The Page icon indicates that the item is a page that is available to you which will be displayed in the display pane.

3.1 Searching the navigation items

To help you locate the required menu option or form within the Action Pane there is a 'Find iTrent Pages' search facility which is found at the top right of the Display Pane. This is enabled by entering a page name or part of the name in the text area, and pressing Enter.
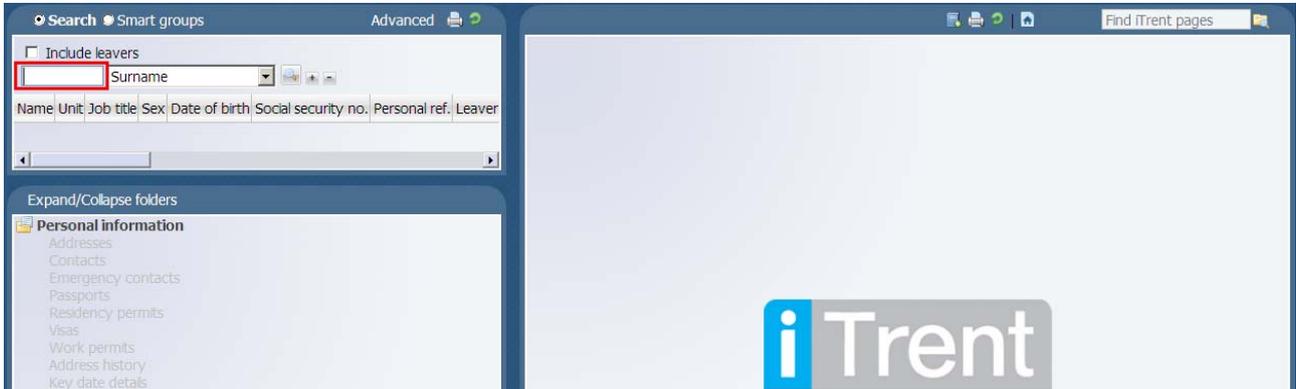
Enter the action you require (in this example work permits) and click the search icon or press enter
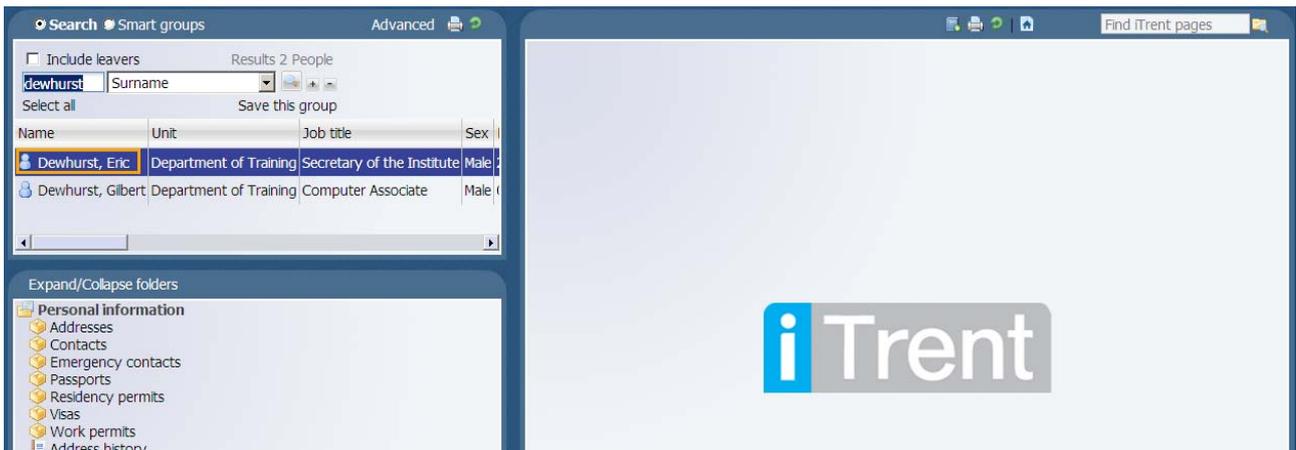
Click on the navigation route you wish to follow

iTrent will then automatically lead you through the steps to locate this item by highlighting each selection you need to make with a red rectangle.

Complete the next step (in this example entering a surname). Enter text or click on the highlighted item and iTrent will guide you to the next step.

iTrent will navigate to the relevant folder (in this example Work Permits) and display details where applicable.
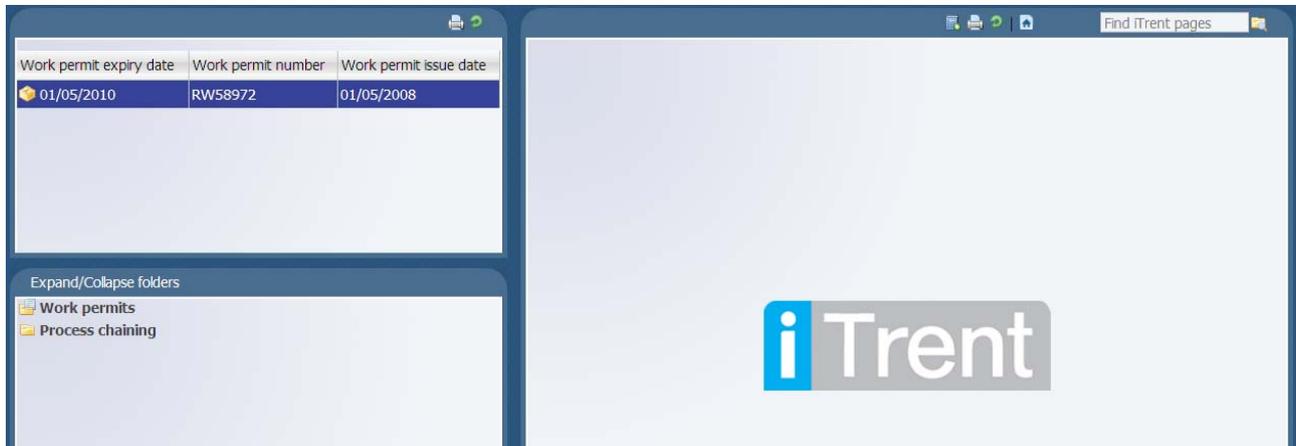
Navigating through the menus can also be made a simplified process by making use of 'Screen Chaining'. This is a process that allows a user to progress through a pre-defined sequence of menus and pages to input data – for example personal details, address details, and social security details for a new starter. Process chaining is a facility which makes use of workflow functionality which can be utilised to inform other CHRIS users that a certain task has taken place.

4 Display Pane

The Display pane is where you will see most of the displayed results and depending on your user profile can perform changes to the data.

4.1 Basic Page details

The position details page shown below shows some of the features available.

The display pane is used to display the results of your selections. Depending on your selections and your security profile you may also be able to update the displayed information.

4.1.1 Standard Field Types

There are a number of different types of field used to display data throughout iTrent:

Display Method	Usage
☑ check box (checked)	A check box is used to denote a condition which can only be true or false. When the box is checked the condition is true.
☐ check box (not checked)	When the box is not checked the condition is false
Text box (non mandatory)	A text box is used to display alphanumerical information. If the information is editable you may overtype any existing text to make changes.
Text box (mandatory)	A mandatory text box is used to display alphabetical information which must be entered before a record can be saved. These are identified by a blue background.
Drop down list	A drop down list allows you to select from a predefined list of options. To view the available options click ▼. Drop down lists are used to allow you to select the most appropriate entry from a predefined list of acceptable values.
Drop down list (mandatory)	A mandatory drop down list allows you to select from a predefined list of options, and one option must be selected before the record can be saved. To view the options click ▼
🔍 Search	Initiates a search, used to select the data for the field to the left of the icon.
Age (years) 61 Age (months) 2 Date 08/07/2012 Display only fields	The data contained in these fields are edited elsewhere in iTrent, or are generated for you using other data. For example these dates for expected retirement are calculated based on the employees date of birth and cannot be directly edited.

Display Method	Usage
Expiry date [ ] Date Field	Date fields accept a number of formats. 21st August 2006 could be entered as 210806 or 21082006, 21/08/06 or 21/08/2006. The result when saved will be displayed 21/08/2006 Entering the day and month only defaults to the current year. Entering the current day only defaults to the current month and year. Entering a two-figure year will default to the current century, therefore any year before the year 2000 must be typed in full. Entering t and pressing the tab key will enter today's date. An alternative method of entering a date is to use the calendar option, which can be found at the end of every date field.
🗓 Calendar	Opens a calendar from which the required date can be selected. Used to select a date for the field to the left of the icon.

5 Search

A search page can be displayed in either the Action pane or, if the search was initiated from a page, it will slide in from the right. You can perform a Simple Search or an Advanced Search. If you use an advanced search you can save the criteria that you used and then re-use the search again at a later time by selecting a Smart Group. A Smart Group is simply a saved search.

5.1 Simple Search
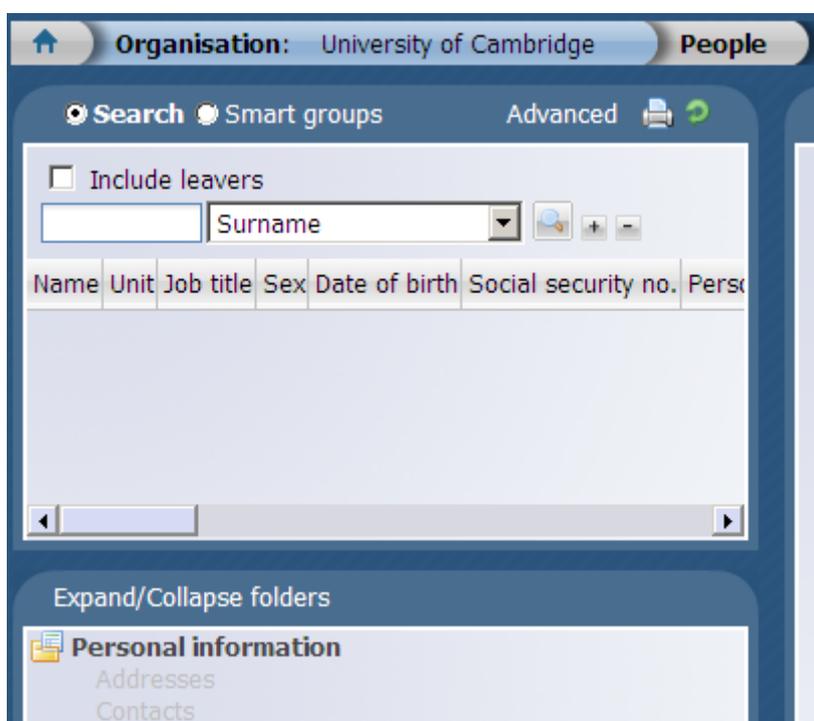
For a simple search you can have one text box to enter your search criteria and next to it there will be a condition. In the example shown you are searching for a name and the name is to be found in the Surname field. The drop-down list next to Surname will show you the alternative fields that are available for this search (E.g. Forename, Job Title, NI Number, Org Unit etc)

Enter a value into the Search box and press the Enter key or click the Search icon to perform a 'simple' search.

Note that the default search uses the text that you enter in a 'starts with' search not as a 'contains' search.

If you want to perform a 'contains' search place an asterisk (*) at the beginning of the string.

Particularly if you have departmental read only access, using an Advanced search is a more efficient way of finding current University employees within a specific School or Department.

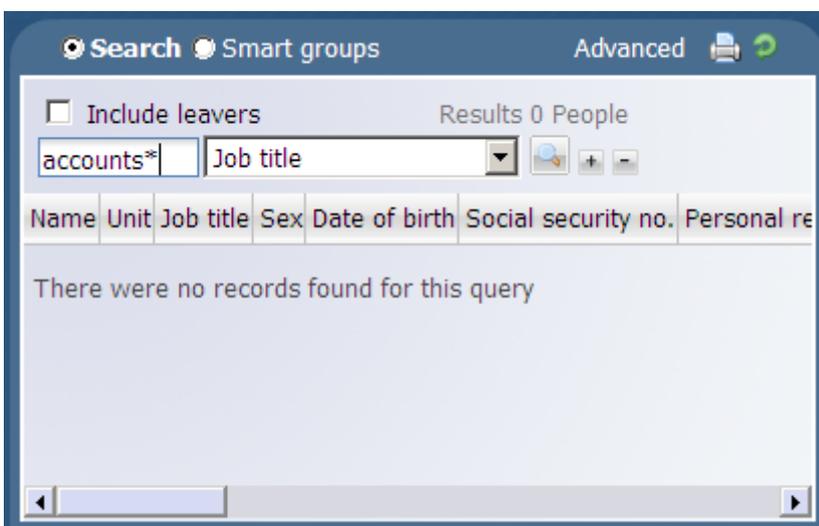iTrent will perform the search and display the results in the Action pane.

Search item = R

Returns 9 people whose surname starts with 'R'.

Search item = *cleaner

Returns 5 people whose job title contains the text 'cleaner'

Search item = accounts*

Returns no items as an * at the end of an item is invalid.

The simple search also enables you to specify more than one search criteria.

To specify additional search criteria click on the [+] buttton.

The example above searches for a person whose Surname is Dewhurst AND their Forename is Eric.

You can remove a selection by clicking the [—] button.

You can build a simple search against the following standard People search criteria: Surname, Forename, Job title, Organisation unit, Payroll, Payroll reference, Personal reference, Pos occ reference, Previous surname, Social Security number and Staff identifier.

You can also include leavers in the search by selecting the Include leavers checkbox
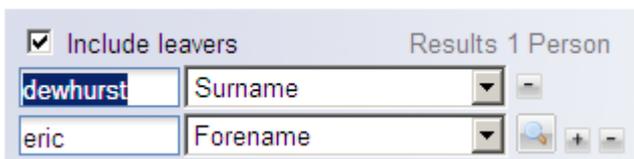
5.1.1 Search Tooltips

If 'Show Tooltip in Searches' has been set in User Settings, then whenever you move your cursor over a list of search data, iTrent will display information for the row in a pop up display.

5.2 Advanced Search

A more detailed search can be performed by clicking the Advanced button

The Display pane will then display the Advanced search display where you can enter more complex conditions for your search.
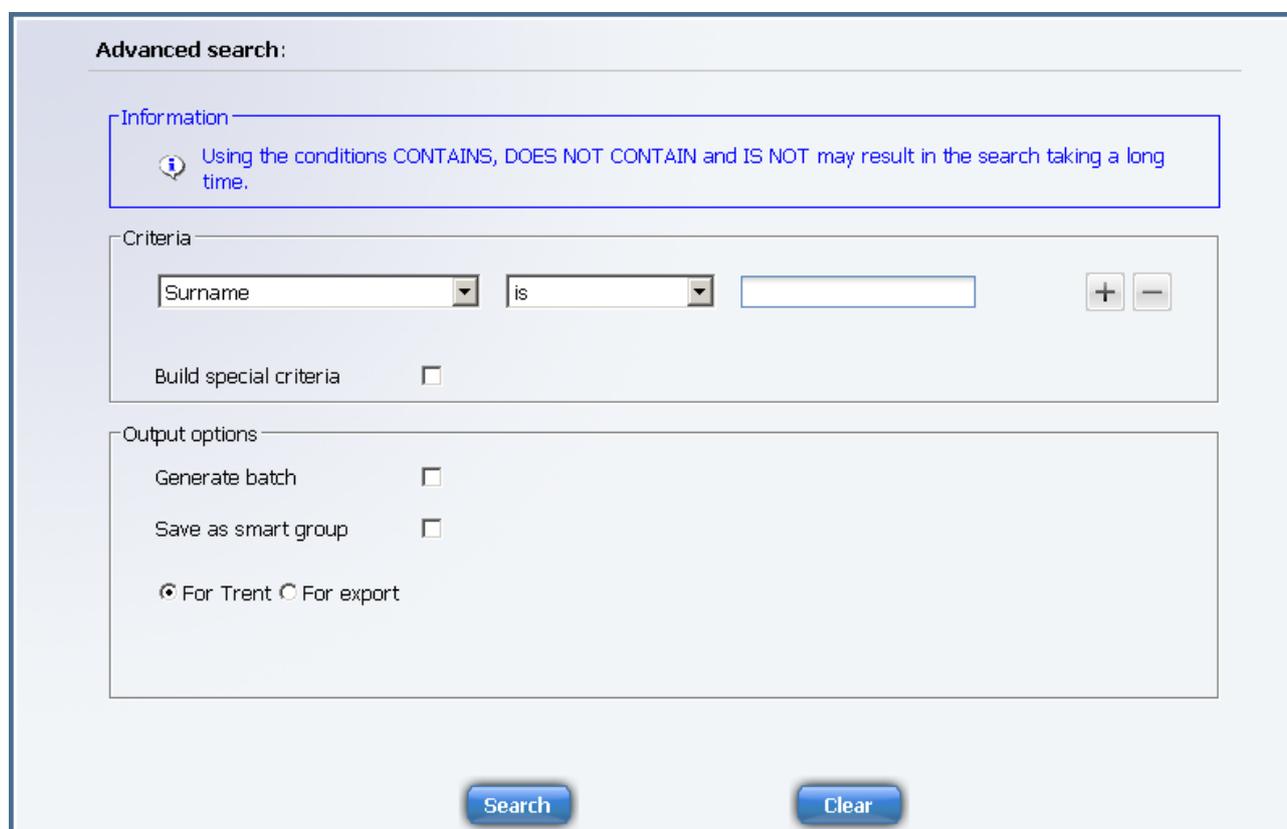
The drop down lists provide you with all the available fields and conditions which you can use.

Additional rows of conditions can be entered by clicking the plus icon . You can then specify whether you require All of the conditions to be matched (an 'and' condition) or Any of the conditions matched (an 'or' condition).

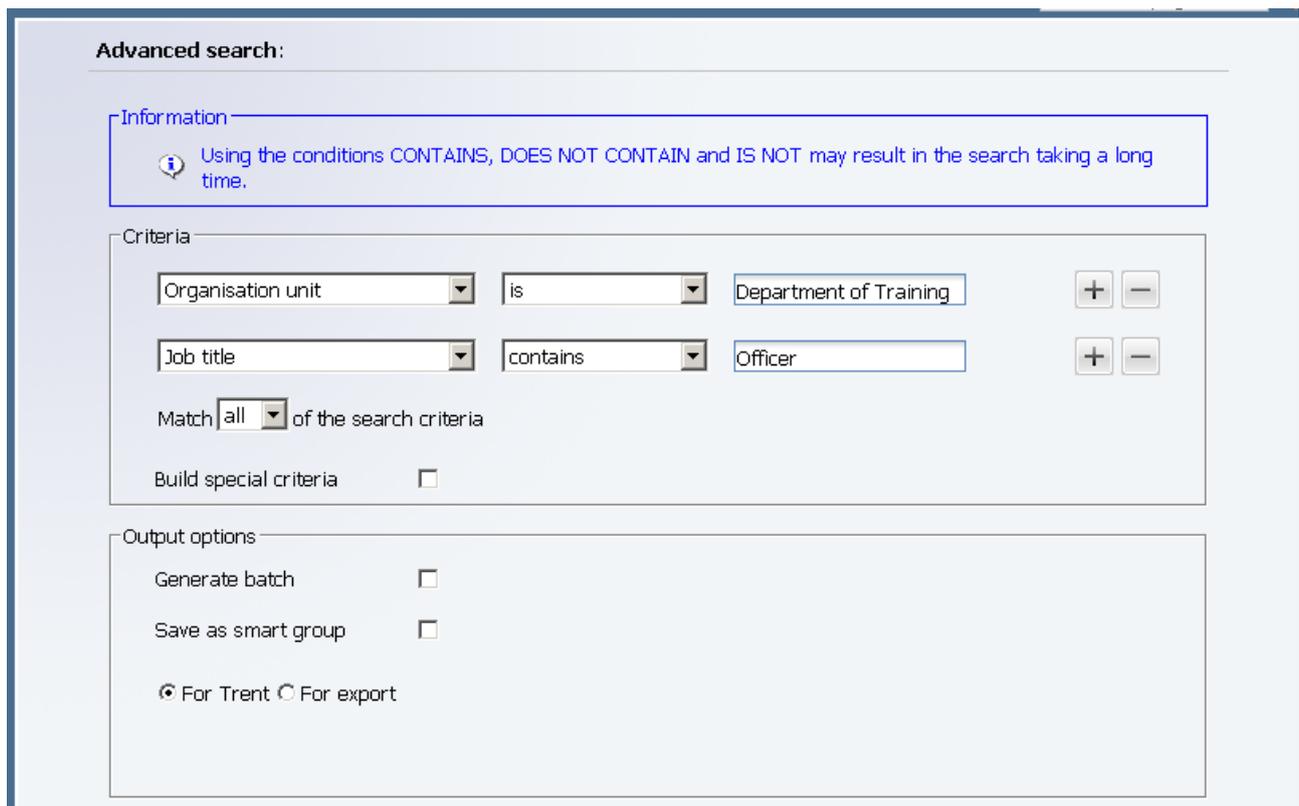Rows can be removed from the condition by clicking the minus icon [–]

When your search conditions are complete you can click the Search button [Search]

iTrent will perform the search and when complete it will display the results in the Object pane.

To clear your search criteria and start again, click the Clear button [Clear]

5.2.1 Special Criteria Searches

Complex advanced searches can be achieved using fields available on the Advanced Search page. These would be used where a combination of 'and' and 'or' conditions are needed.

Start your advanced search as before building the list of search criteria as shown above (this example is taken from the People search). When you wish to add another block of criteria that is to be used as either an 'and' or an 'or' condition, click the Build special criteria check box.

A new drop down list will appear where you can select to add the next criteria block as either an 'and' or an 'or'.

You can then add the additional criteria as before:

Click on the Search button to start the search, the results will be displayed in the object pane.

👤	Andrews, Jeremy	Department of Training	Marie Curie Researcher	Male	18/04/197
👤	Butcher, Jeremy	Department of Training	Marie Curie Fellow	Male	14/01/196
👤	Evans, Benjamin	Department of Training	Advanced Research Fellow	Male	08/02/197
👤	Landis, Robert	Department of Training	Advanced Research Fellow	Male	12/09/196
👤	Ogden, Sean	Department of Training	Marie Curie Researcher	Male	09/12/198

Further blocks of criteria can be added as required by clicking the 'To add criteria block choose operator' drop down list.

To add criteria block choose operator ▼

If you wish to remove a block click the Delete criteria below option which will appear in the drop down list after you have added a new block:

and ▼
Delete criteria below
and
or
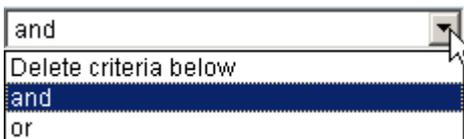
5.2.2 Date Searches

You can perform an advanced search against a date field and specify if it 'is in next' or 'is in last' as criteria for searching. For example:
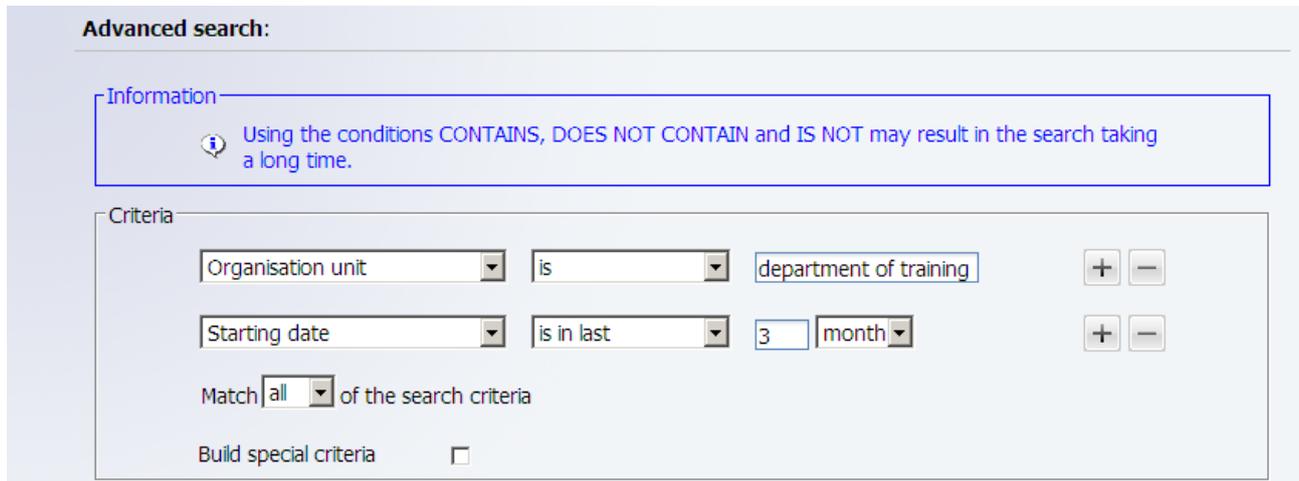
The 'is in next' and 'is in last' criteria allow you to specify a number followed by a drop down list that contains days, weeks, months and years to qualify the selection.

To specify a date range use a combination of 'is after' and 'is before' criteria, for example:
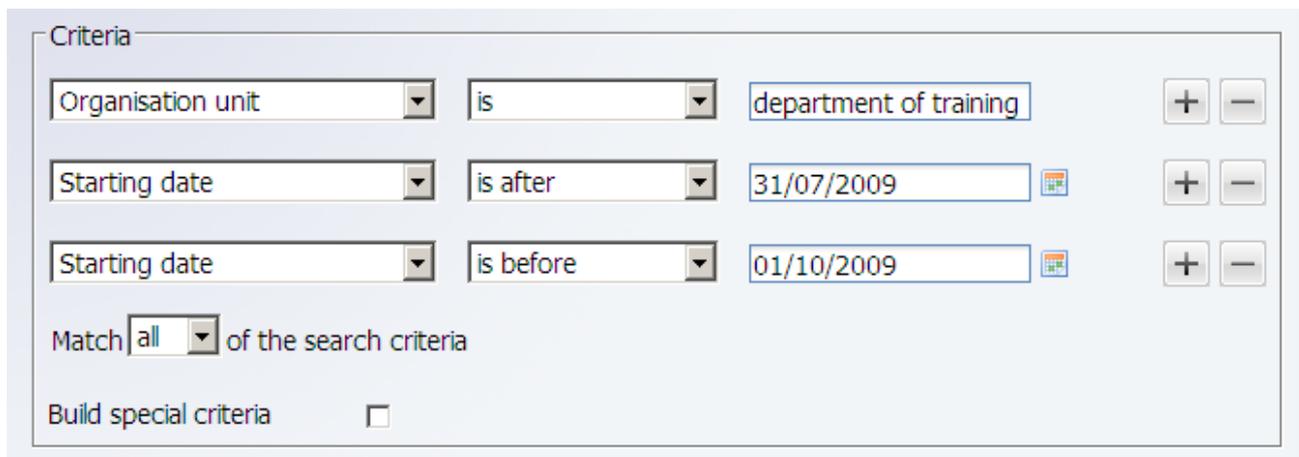
All advanced searches that act against a Unit, Post, Position, People or Costing will force the Effective date field, at the top of the iTrent page to be enabled and active. Therefore all such searches will take this date into account when they are performed. You should set this date before you start the Advanced search.

5.3 Smart Groups

Within Search you can define and use Smart Groups. A Smart Group is the term used in iTrent to refer to a list of records that can be retrieved time and time again without having to reconstruct the search criteria, i.e. a saved query. This feature allows you to organise your records into specific groups, which can be used again when performing tasks for that group of records. For example all new employees whose starting date is in the next 2 weeks. These can be sub-divided into Public and Private groups depending on whether the group is specific to you or may be used on a wider basis.
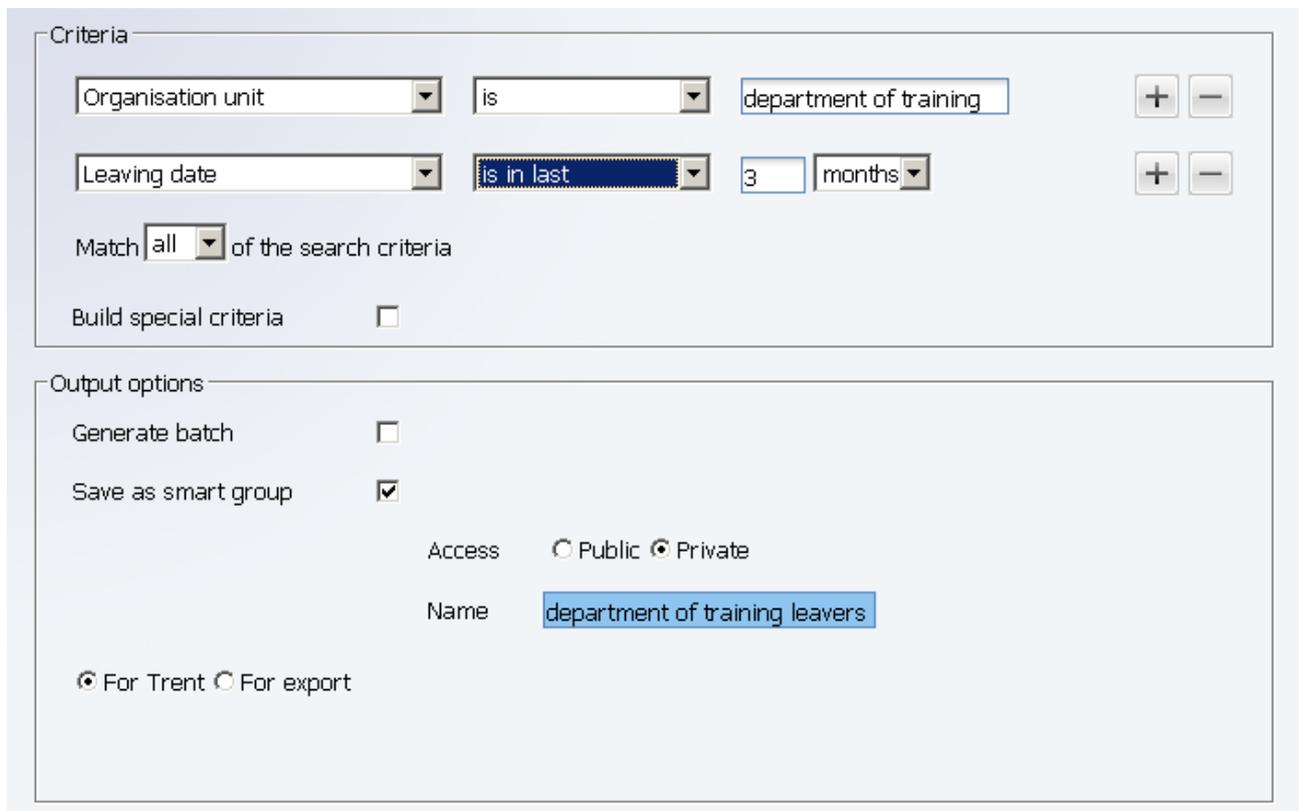
To create a new Smart Group, enter your search criteria, check the Save as smart group box and enter a name for this saved search.

Once created, the group can be accessed at any time through the search options, by clicking the Smart groups radio button.

Select the required group and each record that fits the criteria for the Smart group will be displayed

To edit a smart group, select the group and then choose edit this group.

You can choose whether to make your smart group **dynamic** or **fixed**.

A dynamic Smart group is maintained by iTrent and contains the records that meet the search criteria each time the smart group is accessed. When people either join or leave an included unit, the dynamic smart group will be automatically updated to reflect the changes.

A fixed Smart group is maintained manually and contains those records that met the search criteria at the time the smart group was first generated. Items can be removed at any time but you cannot add items to an existing fixed smart group

5.4 Exported output

An advanced search can be further enhanced by sending the output to a file using the for export radio button.

The results can be sent to various applications by selecting the required format.

To display the criteria used in your advanced search with your exported data, click the display search criteria check box.

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.

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

[⏭] Add all will move all the fields from the Available list to the selected list

[▶] Add selected will move just the highlighted item from the available list to the selected list

[◀] Remove selected will move just the highlighted item from the selected list to the available list

[⏮] Remove all will move all the fields from the selected list to the available list

You have the option of sorting the output based on two fields. Highlight the main sort field and then click the [1] button which is displayed. The button and primary field will change to red. If required highlight the second sort field and then click the [2] button. The button and secondary grouping chosen will change to blue.

Click on the [Export] button to complete your search.

6 Explorers

There are two explorers that you can use. The Organisation Explorer and the Mini Explorer.

The Organisation Explorer menu option will only be available to those users with a University wide user profile. For users with a Departmental profile Organisation Explorer will not appear as a menu option, but Mini Explorer can be used to view the department for which the user profile applies.

The whole area of the Organisation Structure is controlled using effective dates. Information that is added, amended, or deleted is recorded as a change on that specific date. It is important that the date selected when using the organisation explorer is the correct one, as the organisation will differ from day to day.

6.1 Using the Organisation Explorer

This feature allows you to view and maintain a dynamic diagram of the structure of schools, faculties and departments in the iTrent display pane. Each item within the structure is enabled to act as a navigational link to the functions and/or content of the selected component.

It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain elements search for the unit, post or position and click the Mini explorer link in the action pane.

6.1.1 To search using the Organisation explorer

1.   Select the University of Cambridge in the object pane and click the Organisation explorer link in the action pane.

2.   Enter the effective date. The top level node of the Organisation structure diagram appears in the display pane.

---
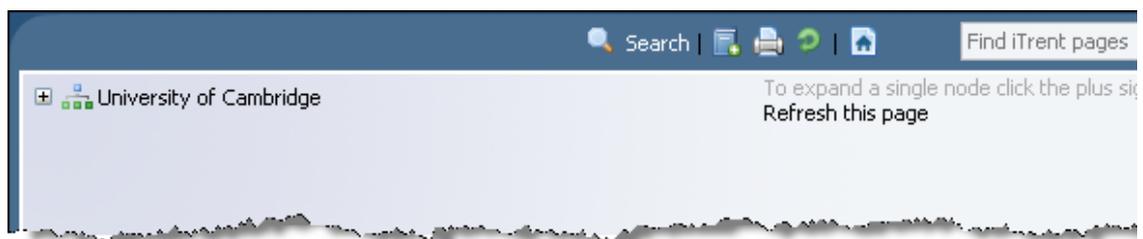
3. Click the Search 🔍 button in the display header toolbar
    iTrent opens the sliding search pane to the right of the display area.

4. Enter the required search item in the text field provided and click 🔍
    iTrent displays all the matching items in the search pane.
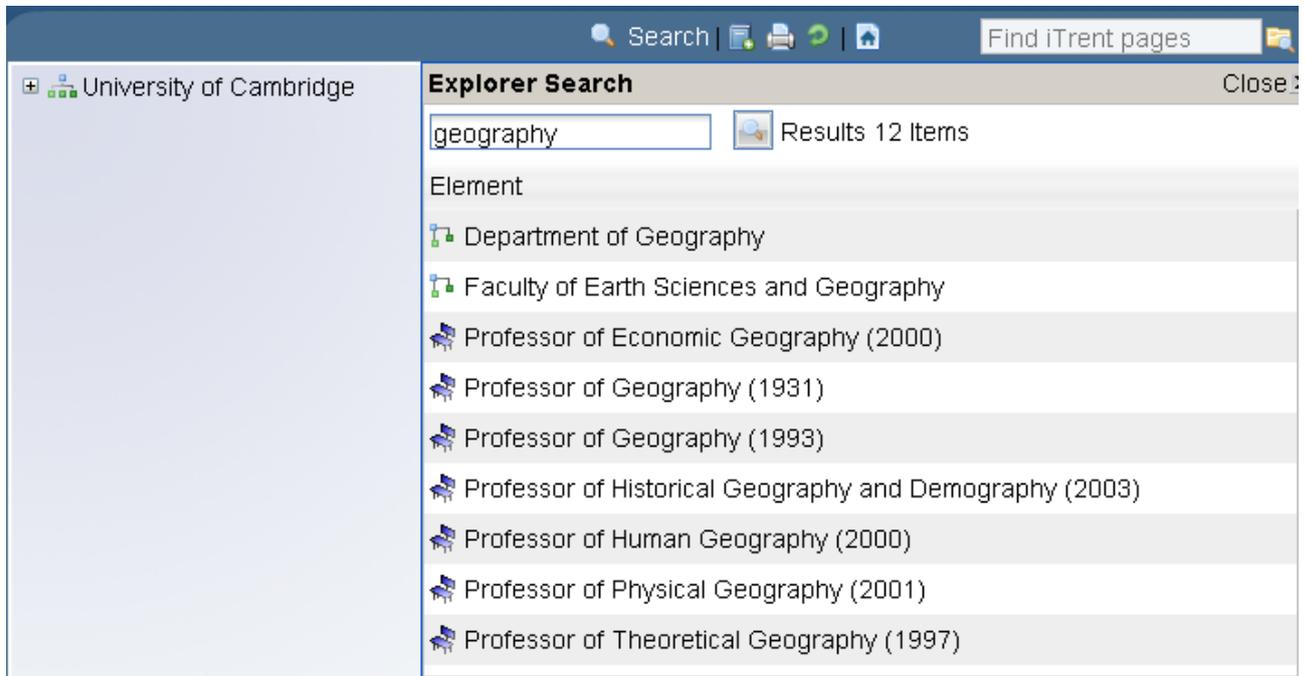
5. Select the required item from the search result.
    iTrent expands the Organisation explorer to reveal the location of the selected item.
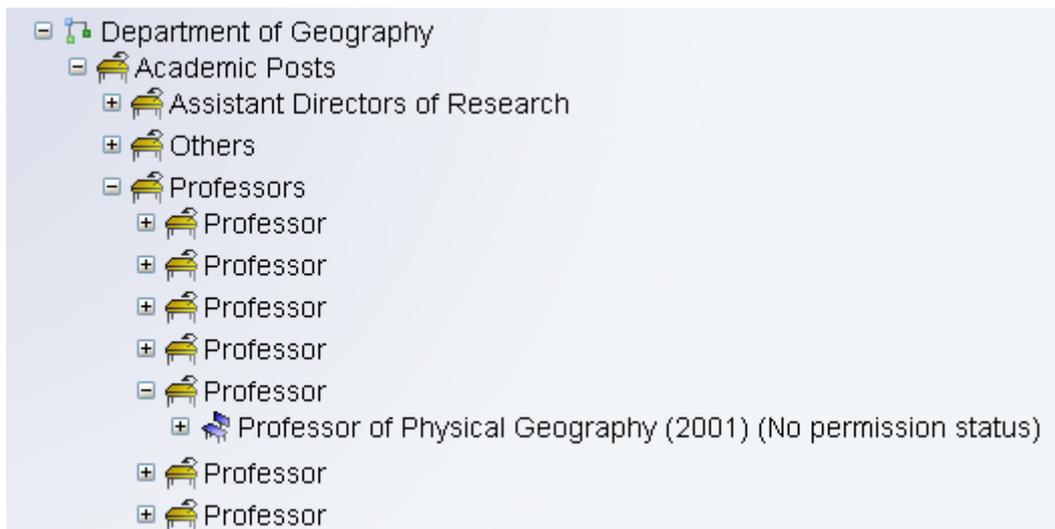
6.2 Organisation Structure

iTrent's organisation structure is made up of Units, Posts, Positions and Contracts.

Unit

The main units which make up the University of Cambridge structure are Colleges, Council and General Board, External and Roll Delivery Unit.
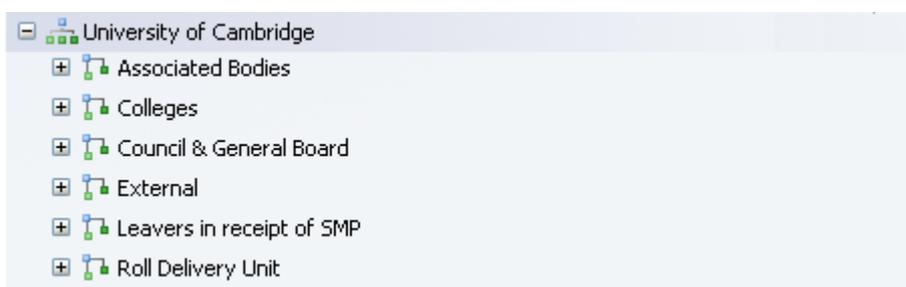
These units are then further divided into units within these main units for the Schools, Faculties and Departments.

Post

Within the Faculties and Departments are Posts. There are three levels of posts within the structure.

This screen displays the Department of Architecture

Level 1 posts are Academic, Academic Related, Headships, Research, Research Students and Support

Level 2 posts are shown below this – Assistant Directors, Others, Professors, Readers, Senior Lecturers, University Lecturers

Level 3 posts are the 2 Professor Posts that exist within the Department.

Position

A position is a location in the Organisation in which a person can be placed.

A person cannot occupy a post directly; the post is always filled by means of an intermediate 'position'.

If the chair icon is blue the position is occupied.

If the chair icon is green it indicates that the position is vacant and as yet unoccupied

If the chair icon is red it indicates that the position is vacant and has a recruitment requisition attached to it. (Recruitment functionality will be a later phase of the project)

People

Each person that we hold details for in iTrent will be shown with this icon. People are attached to the structure via a position and a contract is created.

A contract within iTrent is not a contract of employment, but the piece of data which binds an employee to a payroll.

Reporting

Reports that are produced from iTrent detail reference numbers that are automatically generated by the system

Occupancy Reference	Post Reference	Position Reference	Position
40013143	56542	56542	University Lecturer

Once a post and position have been created the post and position reference numbers will always remain the same regardless of who occupies the position.

The occupancy reference number is a unique number specific to an individual in that position. If the person leaves and is replaced by a new occupant a new occupancy reference unique to that person's occupancy is generated.

Post and Position Menus

The position details menu displays information specific to the individual employee who occupies a position.

Position details
- Addresses
- Contacts
- Mini explorer
- Patterns
- History
- Hours and basis
- Inheritance chart
- Occupancy details
- Payscale values
- Position details
- Position inheritance summary
- Position occupancy history
- Position summary
- Salary details
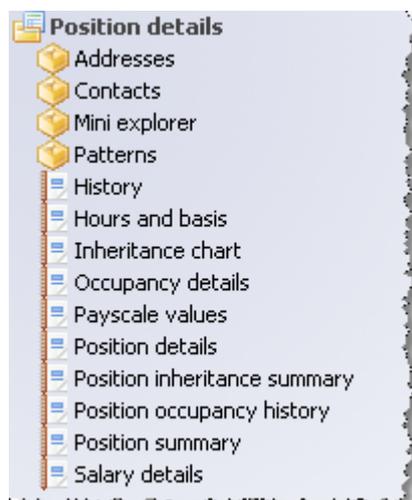
The Payscale values form shows the grade and scale point for the employee.

Occupancy details shows expected occupancy end date, for example where an employee is limited by their work permit expiry date.

Hours and basis shows the number of hours that the employee is contracted to work.

Addresses shows the UMS address at which the employee works.

Each position is attached to a post and the post details menu displays information specific to the post and the conditions that a position should go back to when an occupant leaves.
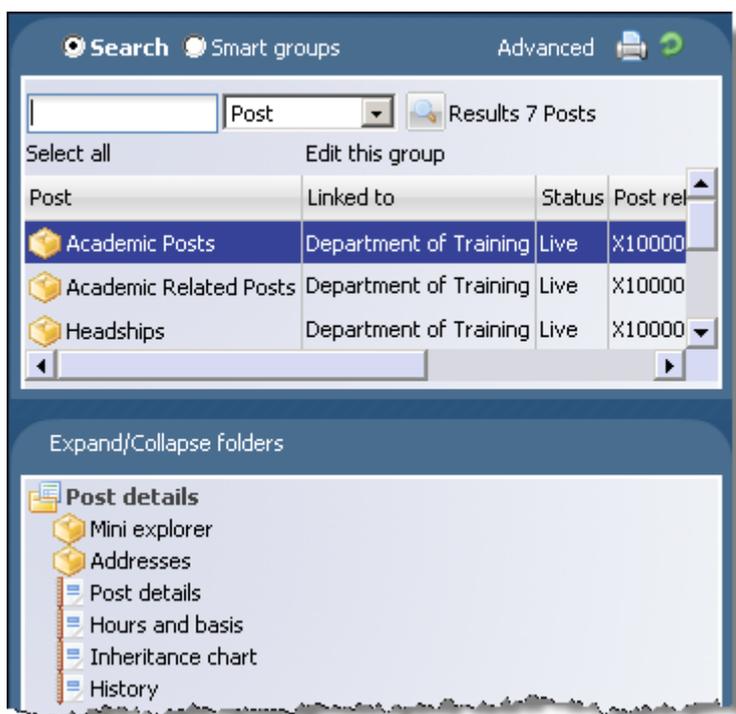
The Payscale values form (available on HR users profiles) shows the grade of the post, but no scale point as this is individual to the occupant.

Hours and basis shows whether it is a full time or part time post. A post may show as full time, but position details could show that the employee occupying the position is working less hours.

Addresses shows the UMS address for the faculty or department. The position details address may be different where the occupant is located in a different place of work.

6.3 Using the organisation mini explorer

The mini explorer allows you to view and maintain your departments' details in the object pane, and to add, maintain and view new elements to it as required.

As the whole structure of the University is so large it is easier to create, amend or view the specific area of the organisation structure you require using the Mini Explorer.

6.3.1 Accessing the mini explorer

With the University of Cambridge selected in the object pane, select Unit, Post or Position from the action pane and search for your department.

Select your department from the object pane and click the link to the mini explorer
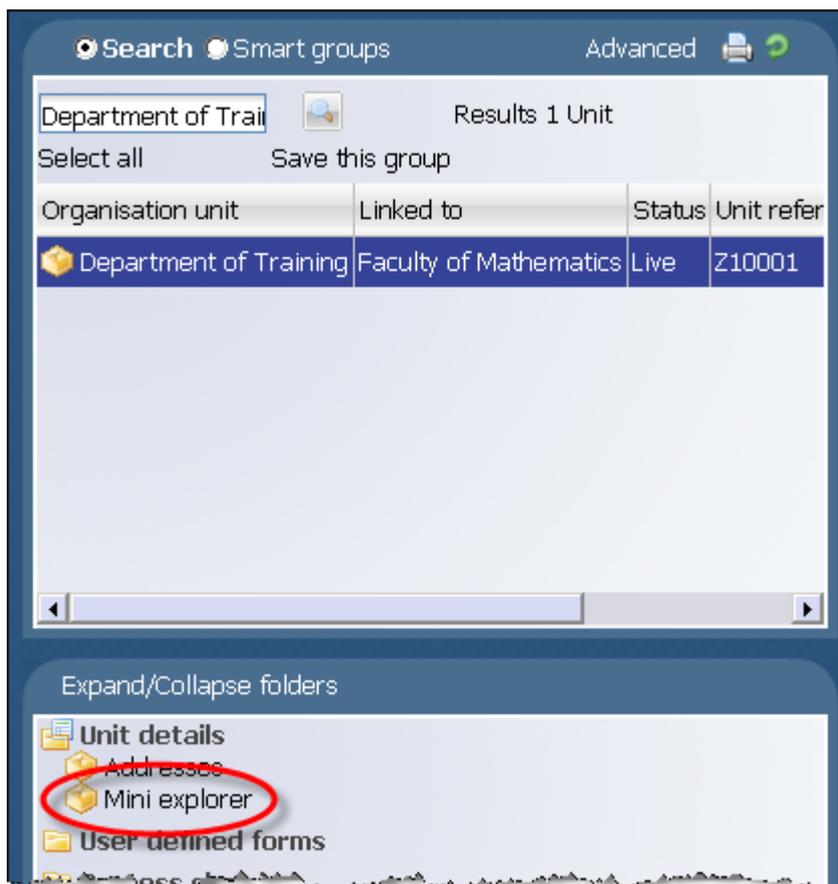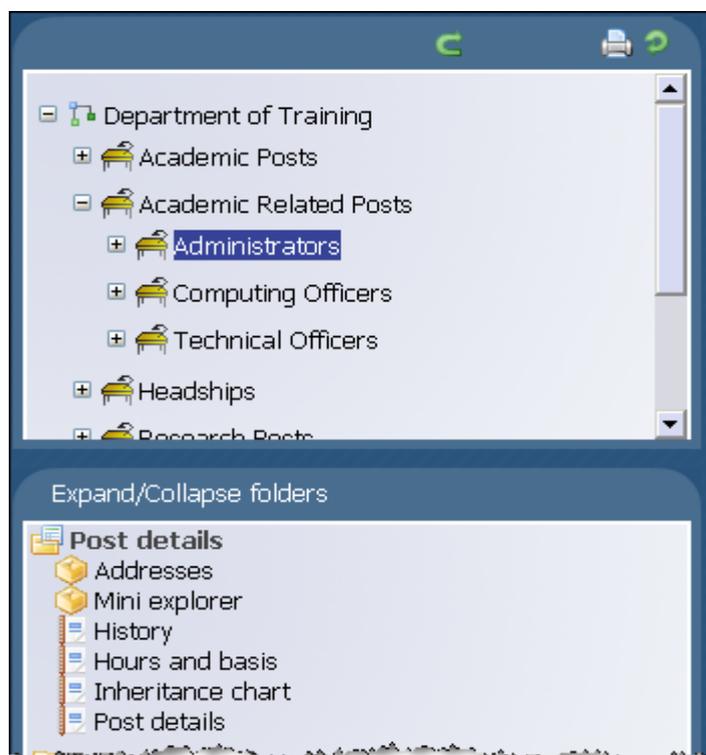
The unit icon of the department will appear in the object pane and can be expanded if applicable by clicking the plus icon ⊞ adjacent to it.

The mini explorer can also be used to access details of a post or position in a similar way.

6.3.2 To maintain existing data

If you need to modify existing structure components select the required element in the object pane and the related function will become available in the action pane.

Selecting a person in the object pane will make person related options available in the action pane. Selecting unit, post or position in the object pane will update the action pane to display the available options for the unit, post or position respectively.

6.3.3 Amending or entering new details

Select the element (node) to be modified in the object pane and then click the required element details node in the action pane. Existing information will be shown on the function details page in the display pane, where it can be amended as necessary.

When you have completed an entry or amendment, click **Save** in the display pane to save the changes.

Access to be able to maintain, amend or enter new details will be according to your individual user profile.

7 Inheritance

Throughout iTrent, you will see references to inherited values. Inheritance is used to allow information to be applied at a high level within the organisation and then it is defaulted down through its related structures, down to position level.

Inheritance enables the contract teams to create posts with certain values that are inherited through to the position. Where details have been amended for an individual employee at position level – for example a full time employee arranges to work part time – the post will retain the original value and this will be re-inherited when the position is vacated.

There are a number of items that can be inherited through iTrent, including:

- Addresses, Contacts and Location

- Terms and Conditions

- Grades

- Patterns (e.g. working patterns)

- Hours

- Payroll elements

- Payment details

- End Dates

Inheritance items are accessed through the relevant details form from Unit, Post or Position.

Each inheritable item is shown with a symbol to show whether the value has been inherited or has been overridden:

Inherited Value

Overridden Value

Where inherited items are overridden, it is very important to be aware of the impact this can have on other areas of the organisation structure and the information that is attached to it.

8 Keyboard Shortcuts

The following keyboard shortcuts are available:

Shortcut	Action
Alt + A	Advanced Search (Enter to activate) only when Search is displayed
Alt + B	Same as a left mouse click on the navigation item
Alt + E	Selects the Effective date
Alt + H	Selects Help button (Enter to activate) (When available)
Alt + M	Selects My Settings (Enter to activate)
Alt + N	Creates a new View
Shift + Alt + n	Selects the nth action in the action pane, where n is 1 to 5 E.g. Shift + Alt + 4 selects the 4th item
Alt + O	Highlights Organisation in navigation
Alt + Page Down	Cycles down the list in the object pane
Alt + Page Up	Cycles up the list in the object pane
Alt + Q	Quick search on the current navigation item
Alt + R	Closes current View
Alt + S	Saves the current page
Alt + T	Selects To do list (Enter to activate)
Alt + X	Opens an Object drop down list on the currently selected navigation item
Alt + Z	Opens the Action drop down list on the currently selected navigation item
Ctrl + Page Down	Scrolls down through the available views
Ctrl + Page up	Scrolls back through the available views
Page down	Scrolls down through available view pages
Page up	Scrolls up through available view pages
Esc	Cancels the data you have just input
Left arrow	Selects previous item on the navigation path (if not in an input field)
Right arrow	Selects next item on the navigation path (if not in an Input field)