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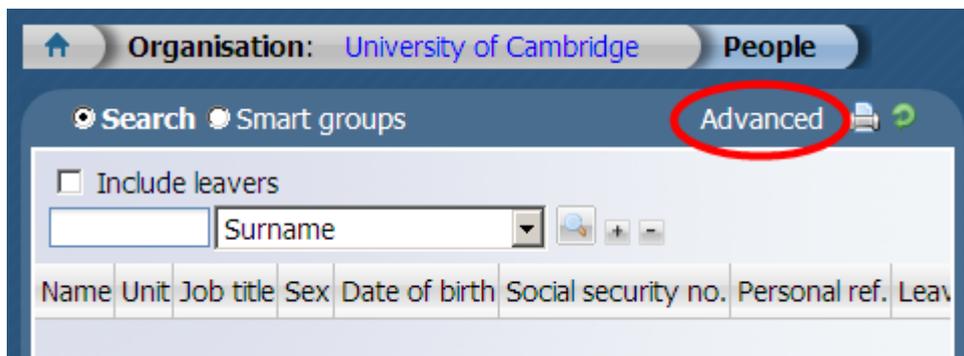
1 Advanced Search

For departmental access to the CHRIS system we have implemented a variety of different user profiles which control access to the specific areas of the organisation applicable to the user.

If your access to CHRIS has departmental security access you will achieve search results more efficiently by making use of the advanced search facility where you can specify the organisation unit (school or department) within which you wish to find records.

Navigate: Organisation > People > Advanced Search

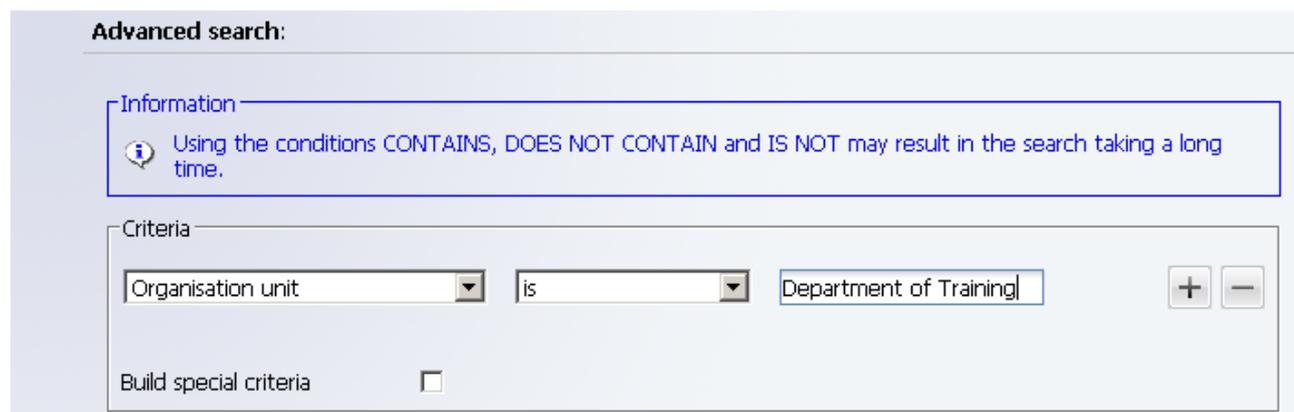
Select the people menu and click on the Advanced button.



Enter the effective date



The first criteria of the advanced search should specify the Faculty or Department name. Type the Faculty or Department name in full rather than using “contains” and part of the name.



Click on the add criteria icon  to display another search condition

Criteria

Organisation unit	is	Department of Training		
Starting date	is in last	2 months		

Match of the search criteria

Build special criteria

Complete the criteria adding additional search conditions as required.

When the criteria is complete, click on the Search button.

Output options

Generate batch

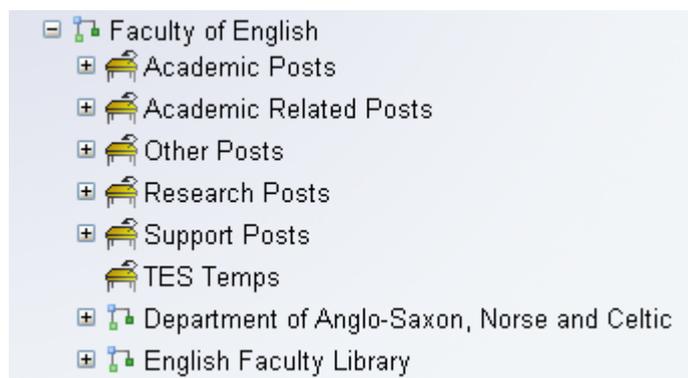
Save as smart group

For Trent For export

1.1 Advanced Search by School

Where your security profile allows access to a school and all the faculties within it, you can search individually by Faculty or make use of the “build special criteria” check box to enable you to specify more than one faculty. There is also an option within the advanced search that allows you to specify lower levels within a unit. For example in the Faculty of English using “include lower levels” would return records matching the criteria specified for the Department of Anglo-Saxon, Norse and Celtic and English Faculty Library.



The criteria “Include lower levels” with the operator “true” can be used to complete this type of search

Advanced search:

Information

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

Criteria

Organisation unit	is	Faculty of English	+	-
Include lower levels	True		+	-
Starting date	is in last	2 months	+	-

Match all of the search criteria

Build special criteria

The search results return new starters from the Department of Anglo-Saxon, Norse and Celtic as well as from the Faculty of English.

Unit	Job title
Department of Anglo-Saxon, Norse and Celtic	University Lecturer
Faculty of English	University Lecturer
Faculty of English	Unestablished University Lect
Faculty of English	Unestablished University Lect
Department of Anglo-Saxon, Norse and Celtic	Unestablished University Lect

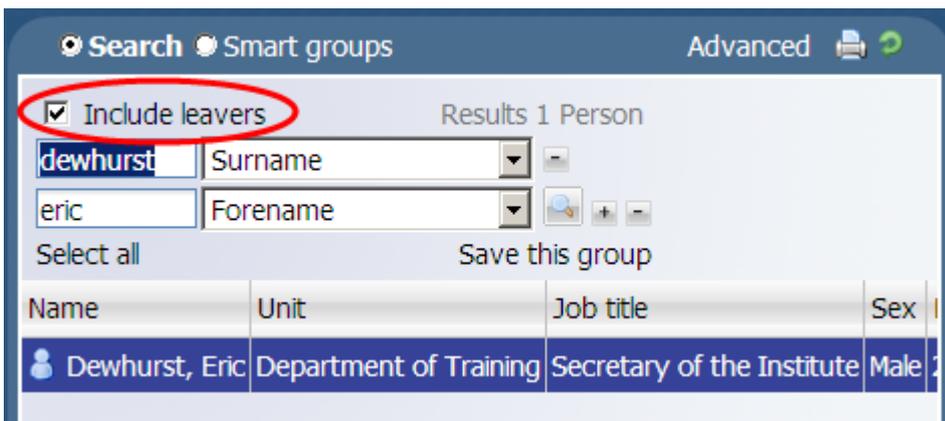
Note

Please ensure you use the include lower levels feature responsibly particularly where you have access to a large school. It is pretty intensive and will take a minute or two to run. You might be best running it as an export to Excel search. It is recommended that you try only to run it during 'quiet' times, for the sake of other users!

- [-] [tree icon] School of the Humanities and Social Sciences
 - [+] [tree icon] Board of History and Philosophy of Science
 - [+] [tree icon] Board of Land Economy
 - [+] [tree icon] Centre of African Studies
 - [+] [tree icon] Centre of International Studies
 - [+] [tree icon] Centre of Latin-American Studies
 - [+] [tree icon] Faculty of Archaeology and Anthropology
 - [+] [tree icon] Faculty of Economics
 - [+] [tree icon] Faculty of Education
 - [+] [tree icon] Faculty of History
 - [+] [tree icon] Faculty of Law
 - [+] [tree icon] Faculty of Social and Political Sciences
 - [+] [tree icon] Office of the School of the Humanities and Social Sciences

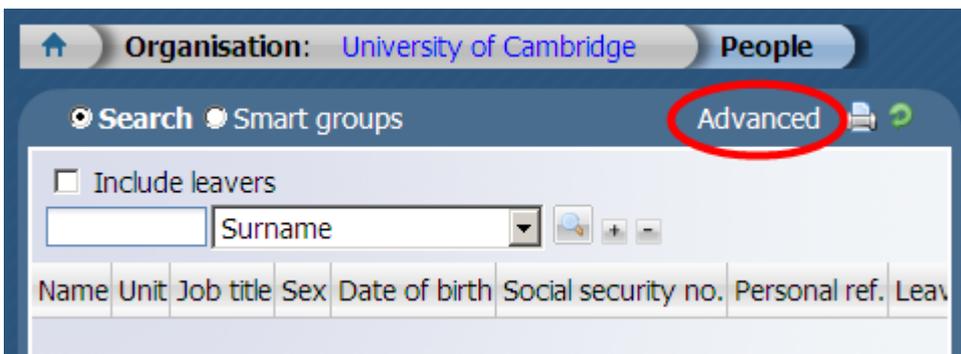
1.2 Searching for Leavers

When you perform a simple search records for people who are currently in employment will be returned, but if you select the Include leavers checkbox you can also search for previous employees. You can specify other criteria, such as Surname and Forename as part of your simple search to find details of a particular leaver.



You can also search for leavers within Advanced search.

To find all leavers within a specified date range



Enter the effective date

Specify your department and click on the add criteria button



Select Leaver Status

Criteria

Organisation unit	is	Department of Training	+
			+

- Contract end
- Contract position start
- Contract position end
- Position reference number
- Position occupancy reference
- Leaver status**
- Payroll
- Payroll reference
- Previous surname
- HESA staff ID
- Passport expiry date
- save as smart group

Select Leavers Only (or include leavers)

Criteria

Organisation unit	is	Department of Training	+
Leaver status	Exclude leavers		+

Match **all** of the search criteria

Build special criteria

- Exclude leavers
- Include leavers
- Leavers only**

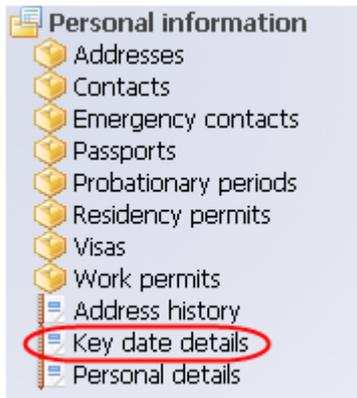
Specify date criteria

Criteria

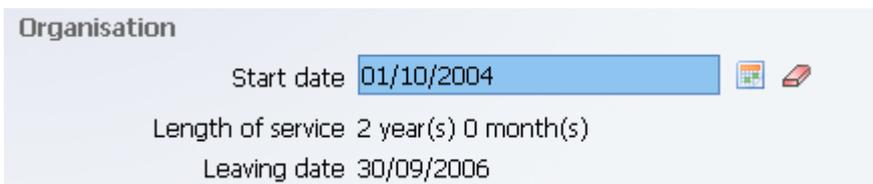
Organisation unit	is	Department of Training
Leaver status	Leavers only	
Leaving date	is in last	3 months

Click on the search button to start the search.

Once the results are displayed (either through the simple search or advanced search) leaving details can be viewed by selecting Key date details from the Personal Information folder



Length of service and leaving date are displayed in the Organisation section of the key dates screen.

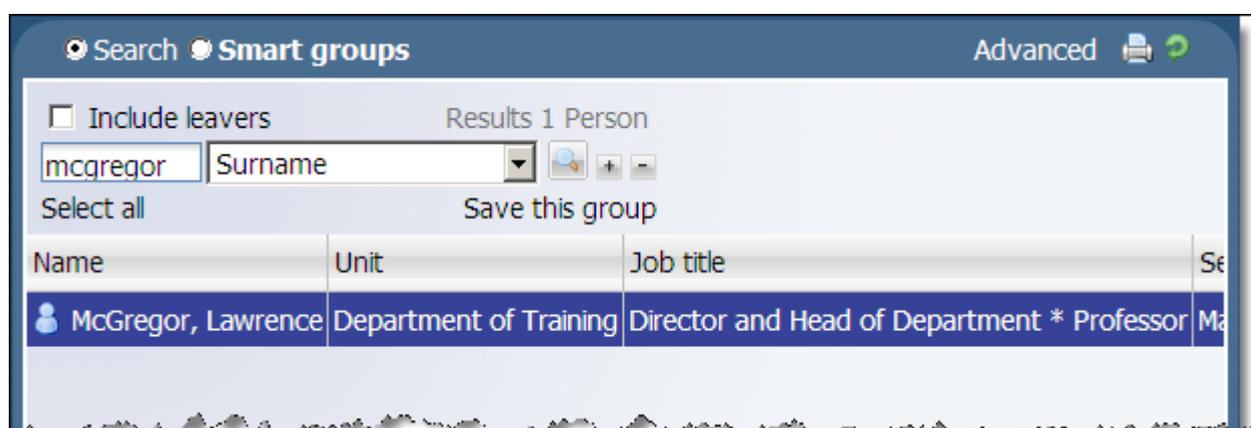


2 Individuals with multiple positions

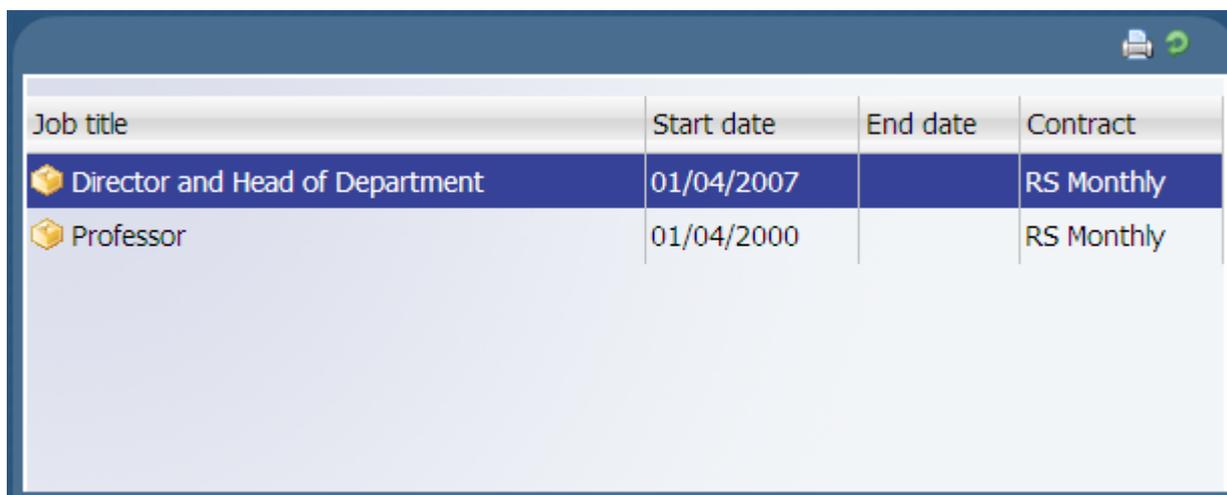
Many individuals have more than one position and this is shown in one of two ways depending on whether the positions are on the same payroll or not.

2.1 Two positions on the same payroll

When you search for an individual who has more than one position the titles of each position are displayed in the object pane separated by an * symbol.



If you navigate to the employee's employment folder and select positions you will be able to view the start date of both positions. You will notice they both have the same contract name. (One link with payroll).



Job title	Start date	End date	Contract
Director and Head of Department	01/04/2007		RS Monthly
Professor	01/04/2000		RS Monthly

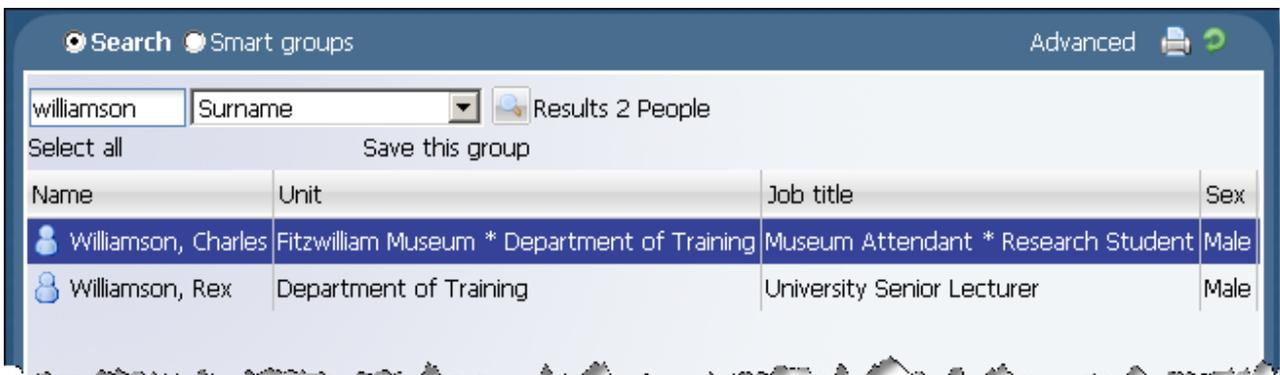
From here highlight the position for which you wish to view more details and then navigate to the appropriate form, for example hours and basis.

The individual will only receive one payslip but each position will be identified on a separate line on it, so that it is clear which value has been earned in each role.

2.2 Positions on Different Payrolls

If individuals have positions on two separate payrolls e.g. Students and Weekly then we will need to have 'multiple contracts'. The contract in iTrent terminology is the linking of an individual with the payroll.

However, from a search point of view the individual's positions will be displayed in a similar manner as to that detailed above.



You will only see the difference if you look at the individual's positions. Now you will note two different contract names.



Despite being on two payrolls the individual will still only receive one payslip and rules have to be set so that the system knows how to calculate NI even if the two payrolls are different frequencies, as the contracts are linked.

3 Limit of Tenure

3.1 Limit of tenure of posts & positions

Where an appointment has a limit of tenure this information will initially be recorded in section C of the New Post Request Form and section D of the New Appointment Request Form. From this HR will record in Trent the expected position end date and the expected position end reason as part of the position details.

3.1.1 To establish if an individual position has a limit of tenure attached to it

There are two screens that provide this information: the position details form and the position summary form.

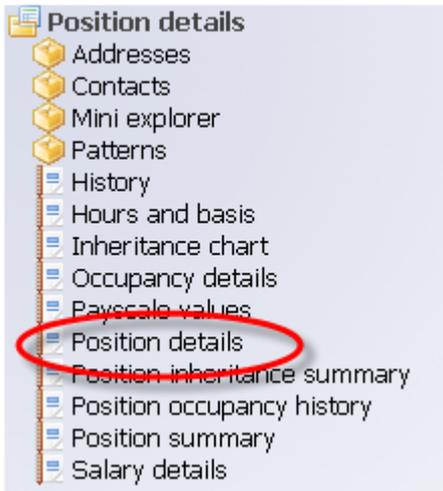
3.1.2 Position details form

Navigate: **Organisation > People (Search for person) > Positions**
 (Select a position) > Position details

1. With the University of Cambridge selected, click on the People menu.
2. Search for the person using surname or person number if known and click on the magnifying glass icon (or press return)
3. Select the person required in the object pane.
4. Click Employment in the Action Pane and then Positions.



5. Select the position for which you wish to view the limit of tenure and choose Position details



- Look at the two fields ¾ of the way down the page: 'expected position end date' and 'expected position end reason'.

Position details: Research Associate

Job title: Research Associate

Start date: 01/10/2005

End date change:

End date:

Position reference: 90000108

Probationary period: [] [] II

Location: [] II

Structure workflow group: [] II

Occupant: Dr David M Hunter

Reporting unit: Department of Training

Reports to: Director and Head of Department
Professor Lawrence McGregor (01/01/1900 -)

Expected position end date: 30/09/2009

Expected position end reason: Limited Funding

Structure group 1: School of the Physical Sciences II

Structure group 2: Contract team C II

Position status

Position status: No permission status

Effective from: 01/10/2005

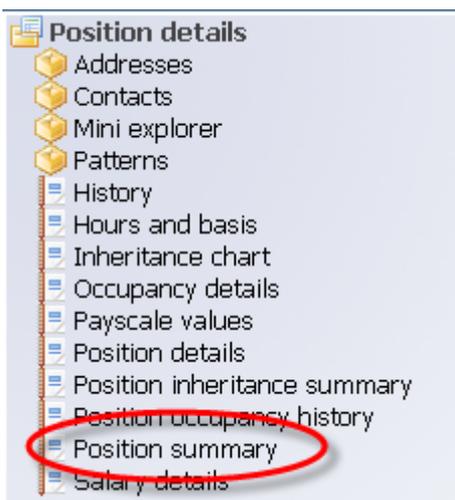
3.1.3 Position Summary form

Navigate: **Organisation > People** (Search for person) > **Employment > Positions**
(Select a position) > **Position summary**

1. With the University of Cambridge selected, click on the People menu.
2. Search for the person using surname or person number if known and click on the magnifying glass icon (or press return)
3. Select the person required in the object pane.
4. Click Employment in the Action Pane and then Positions.



5. Select the position for which you wish to view the limit of tenure and choose Position summary.



Position summary: Research Associate

Position details

Occupant: Dr David M Hunter
Job title: Research Associate
Position reference: 90000108
Occupancy start: 01/10/2005
Occupancy end:
Expected occupancy end date: 30/09/2009
Expected position end date: 30/09/2009
Location:
Structure workflow group:
Organisation unit: Department of Training
Position status:
Effective from: 

- + Reporting manager**
- + History**
- + Workflow group roles**
- + Category, Basis and Type**
- + Hours**

This summary displays the date but does not tell you why the position is expected to end, for this information you must look at the Position Details

3.2 Occupancy Limit of Tenure

When a position has a limit of tenure, HR will also record details of the expected end date for the occupancy of that position. Once again this is displayed in two places: the occupancy details form and the position summary.

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.

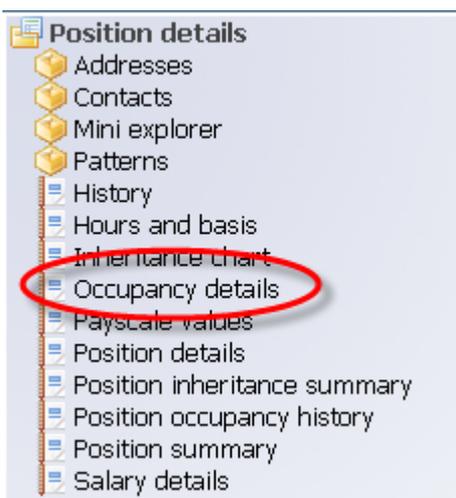
3.2.1 Occupancy Details Form

Navigate: **Organisation > People (Search for person) > Employment > Positions (Select a position) > Occupancy details**

1. With the University of Cambridge selected, click on the People menu.
2. Search for the person using surname or person number if known, and click on the magnifying glass icon (or press return)
3. Select the person required in the object pane.
4. Click Employment in the Action Pane and then Positions.



5. Select the position for which you wish to view the occupancy limit of tenure and choose Occupancy details.



Occupancy details: Research Associate (No permission status) [User Icon]

Current status Live

Occupant Dr Ravi Dhoni

Occupancy start 24/02/2000

Occupancy end

Occupancy type

Position occ. reference

Expected occupancy end date [Calendar Icon]

Expected occupancy end reason

End occupancy

3.2.2 Position summary form

Navigate: **Organisation > People** (Search for person) > **Employment > Positions** (Select a position) > **Position summary**

1. With the University of Cambridge selected, click on the People menu.
2. Search for the person using surname or person number if known and click on the magnifying glass icon (or press return)
3. Select the person required in the object pane.
4. Click Employment in the Action Pane and then Positions.



5. Select the position for which you wish to view the occupancy limit of tenure and choose Position summary.

Position summary: Research Associate

Position details

Occupant Dr Ravi Dhoni
Job title Research Associate
Position reference 90000053
Occupancy start 24/02/2000
Occupancy end
Expected occupancy end date 31/03/2009
Expected position end date 31/05/2009
Location
Structure workflow group
Organisation unit Department of Training
Position status
Effective from 

+ Reporting manager

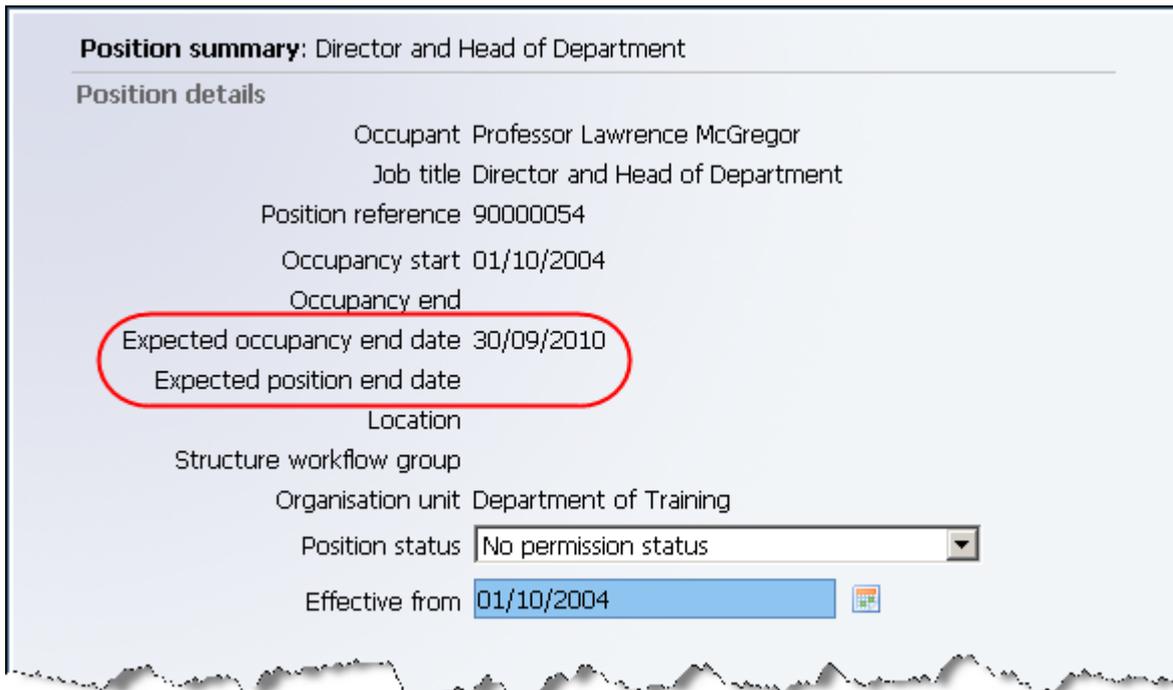
+ History

However, this summary does not tell you why the occupancy is expected to end, for this information you must look at the Occupancy Details.

3.2.3 *Limit of Tenure for just the occupant*

There are occasions where a position does not have a limit of tenure but the individual does e.g. Headships, visa/work permit scenarios.

These are easily identified by looking at the Position summary form.

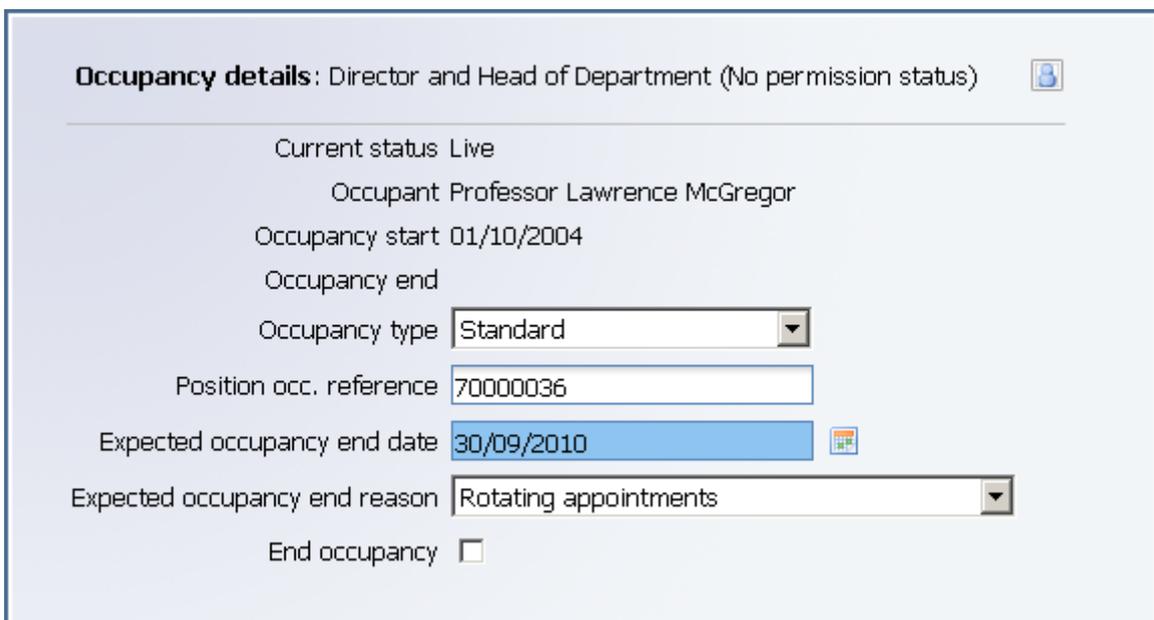


Position summary: Director and Head of Department

Position details

Occupant Professor Lawrence McGregor
Job title Director and Head of Department
Position reference 90000054
Occupancy start 01/10/2004
Occupancy end
Expected occupancy end date 30/09/2010
Expected position end date
Location
Structure workflow group
Organisation unit Department of Training
Position status No permission status
Effective from 01/10/2004

The reason for the occupancy end can then be seen from the Occupancy details form.



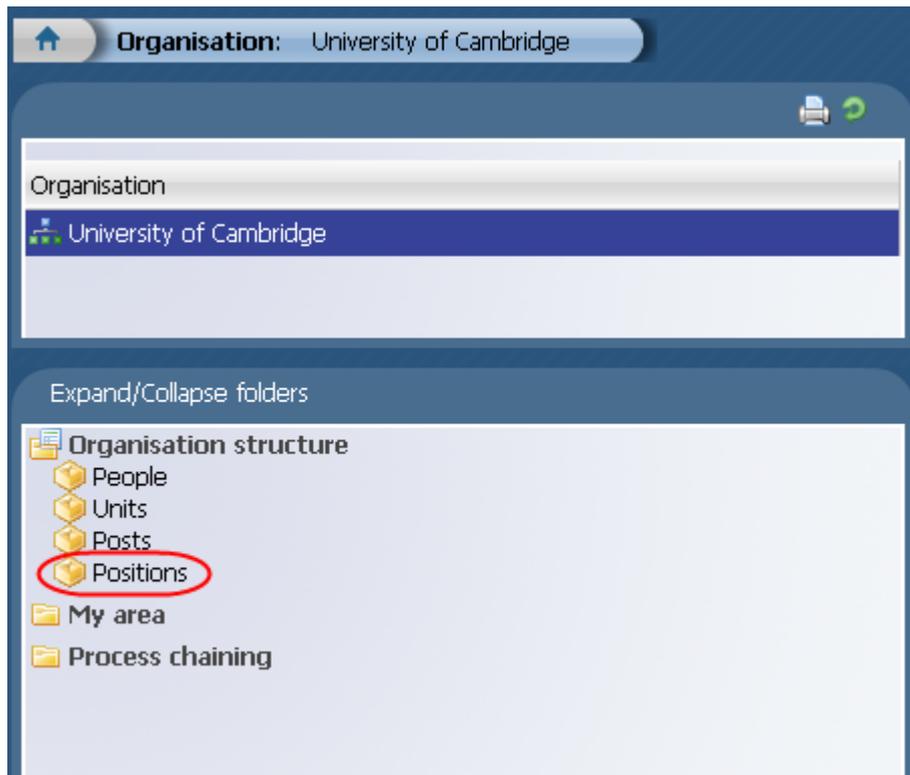
Occupancy details: Director and Head of Department (No permission status)

Current status Live
Occupant Professor Lawrence McGregor
Occupancy start 01/10/2004
Occupancy end
Occupancy type Standard
Position occ. reference 70000036
Expected occupancy end date 30/09/2010
Expected occupancy end reason Rotating appointments
End occupancy

3.3 Running a query to identify limit of tenure appointments

Navigate: Organisation > Positions > Advanced Search

1. From the Organisation structure folder, select Positions.



2. Click on the advanced search button.



- For the first criteria enter your department name and then select 'expected position end date' for the second criteria combined with an appropriate time period or date. If a date is specified this must be in the format dd/mm/yyyy.

You can click on the calendar icon to select a date

Criteria

is

is

Criteria

Match of the search criteria

Build special criteria

Output options

Generate batch

Save as smart group

For Trent For export

October 2008

Wk	Mon	Tue	Wed	Thu	Fri	Sat	Sun
40			1	2	3	4	5
41	6	7	8	9	10	11	12
42	13	14	15	16	17	18	19
43	20	21	22	23	24	25	26
44	27	28	29	30	31		

Today is Thu, 16 Oct 2008

By selecting 'Expected position end date' you will also extract details of occupancy limit of tenure.

Advanced search:

Information

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

Criteria

Organisation unit is

Expected position end date is in next

Match of the search criteria

Build special criteria

Output options

Generate batch

Save as smart group

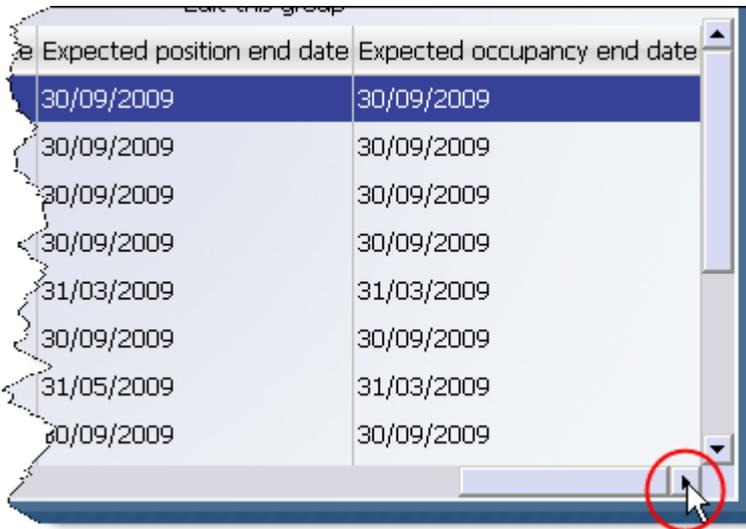
For Trent For export



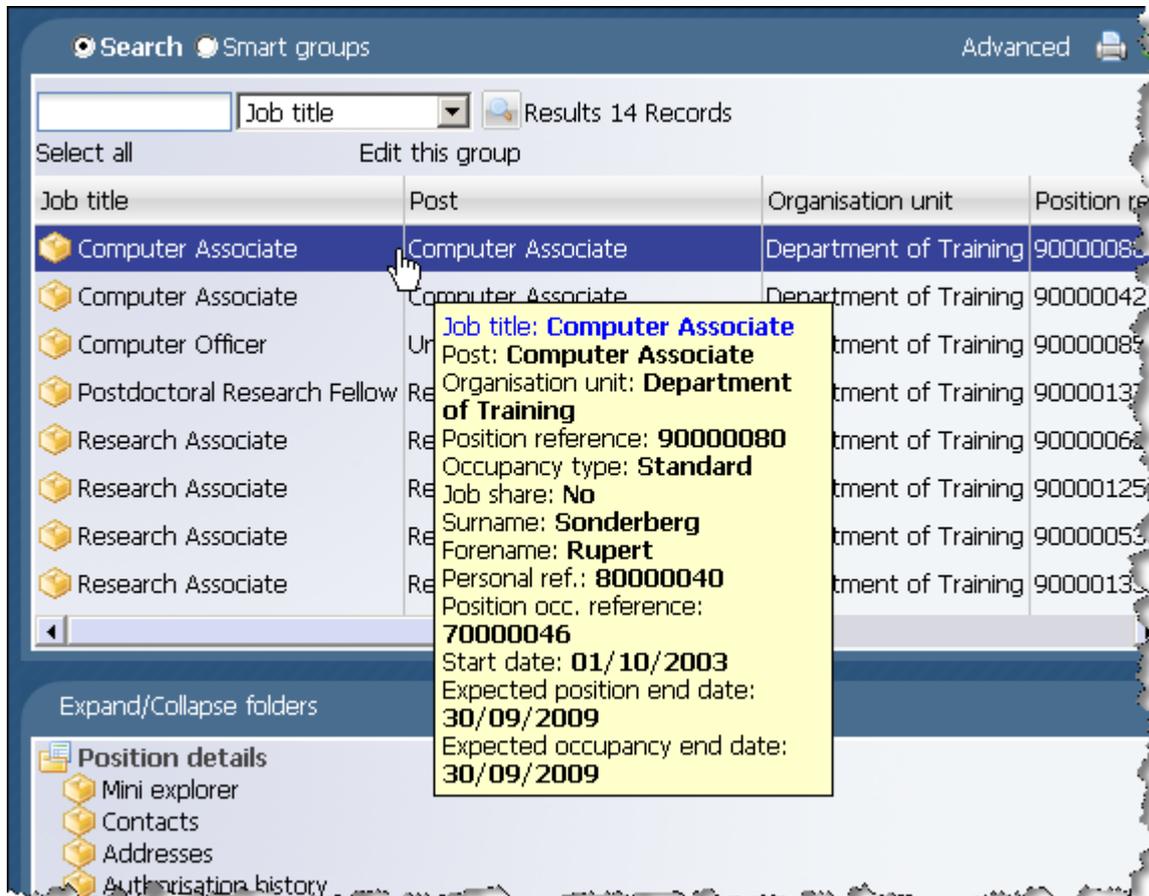
To complete the search click on the  button at the bottom of the screen.

The results will be displayed in the object pane.

Use the scroll arrows to view further columns of information

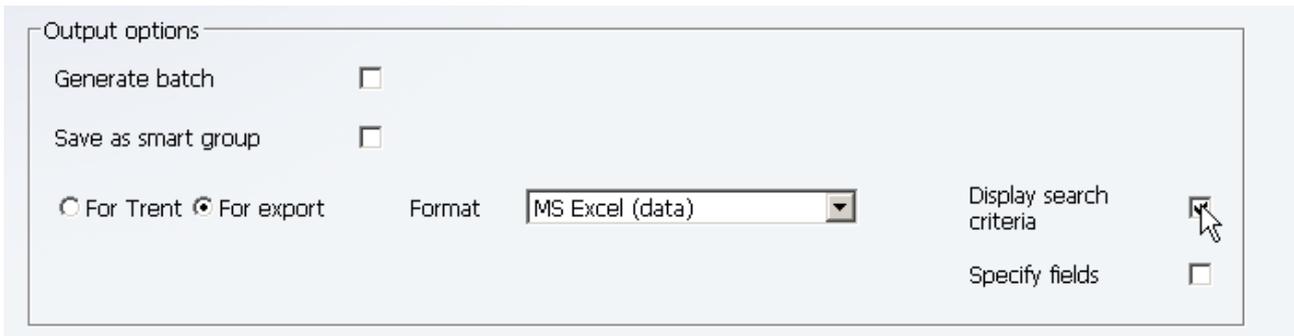


To see the expected position end date and expected occupancy end date for a position move the mouse over the record, the person and position details will be displayed.

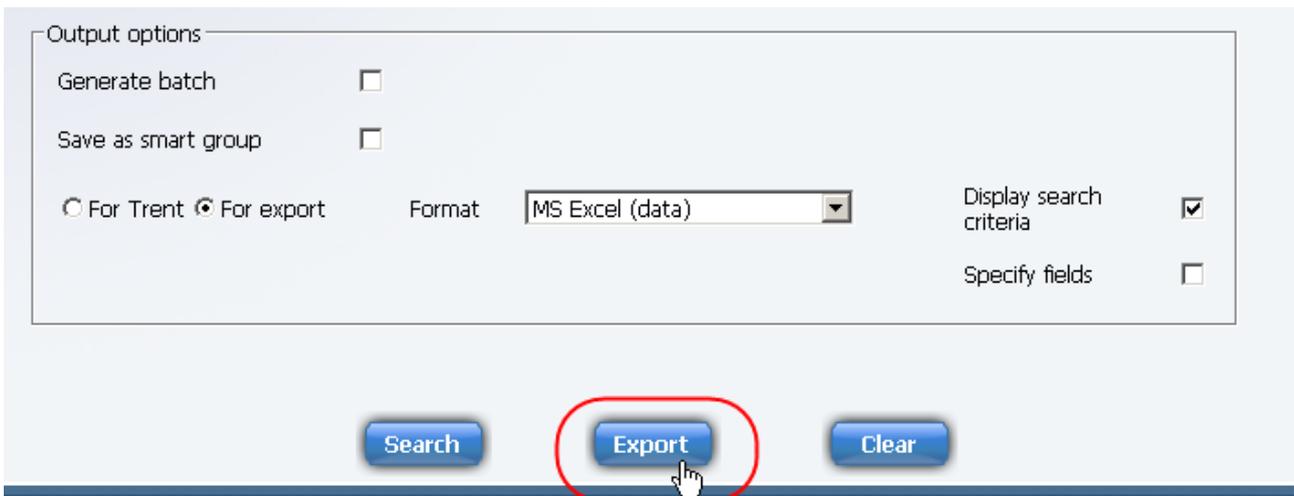


The search results can then be exported to Excel or Word if required. Set the criteria as described previously.

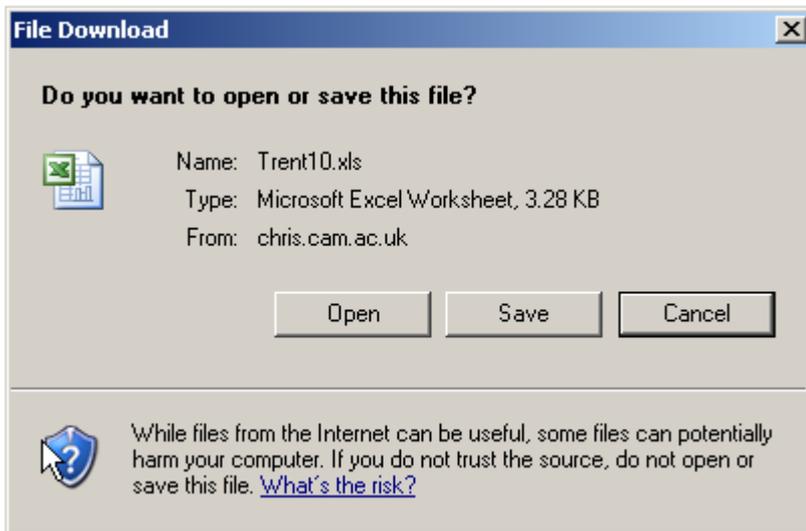
Select the For export option and choose the required format. To display search criteria click the display search criteria check box. The example below shows MS Excel format.



Once all options are completed click on the Export button.



When the dialog box below is displayed, select Open



The data will be displayed.

	A	B	C	D	E	F	G	H
1	Criteria : Organisation unit IS 'DEPARTMENT OF TRAINING' AND				Expected position end	date IS IN NEXT 9 months'		
2	Job title	Post	Organisation unit	Position reference	Occupancy type	Job share	Surname	Forename
3	Research Associate	Research Associate	Department of Training	90000062	Standard	No	Gibson	Douglas
4	Research Associate	Research Associate	Department of Training	90000053	Standard	No	Dhoni	Ravi
5	Research Associate	Research Associate	Department of Training	90000145	Standard	No	Irons	Beatrix
6	Research Associate	Research Associate	Department of Training	90000069	Standard	No	Lavender	Kelvin

4 Costing Information

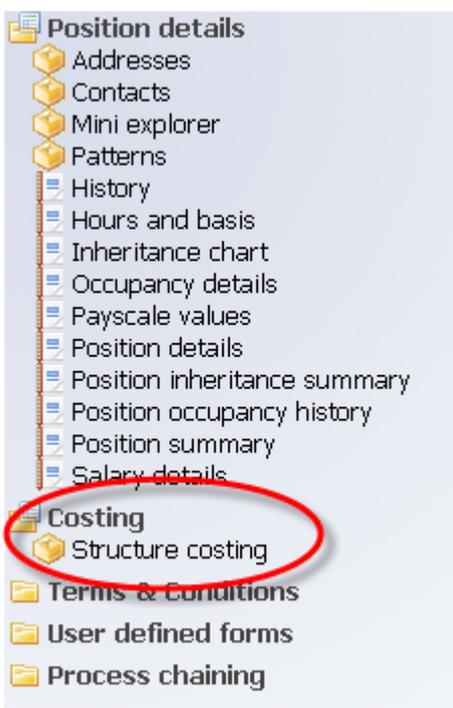
Navigate: Organisation > People (Select a person) > Employment > Positions > Costing

To view the cost code(s) of where a position is funded

1. Search for the person for whom you wish to view costing information.
2. With their record highlighted select the Employment menu and then Positions



3. Select the required position in the object pane
4. Click on the Costing folder and select Structure Costing



5. The costing details will be displayed in the object pane

Costing level	Length	Cost code	Percent	Value	Start date
Structure	24	NMZM/080.11.RG45382.ABAE	100.000		01/02/2008

Cost codes will always be displayed as 24 characters (including full stops and forward slashes)

For example:

Dept Code	Cost Centre	Source of Funds	Transaction Code	Spare
U. MA.	MABA.	ABAA.	ABAP.	0000

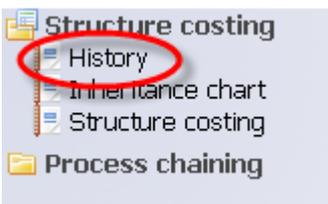
Or for Research Grants

Project Code	Task	Award	Transaction Code
AAAG/001.	01.	RG12345.	ABAE

Split costing will be displayed as two or more rows of information

Costing level	Length	Cost code	Percent	Value	Start date	E
I Structure	24	NAAG/009.01.RG41255.FAAE	81.920		01/10/2007	
II Structure	24	NMZC/727.01.RG44401.FAAE	18.080		01/10/2007	

To view historical date for costing, select the History option from the costing menu



Costing level	Length	Cost code	Percent	Value
I Structure	24	NAAG/009.01.RG41255.FAAE	81.920	
II Structure	24	NMZC/727.01.RG44401.FAAE	18.080	

Effective date	Structure
01/10/2007	I 1: (81.92 % / NAAG/009.01.RG41255.FAAE)
01/10/2006	II 1: (80.39 % / NAAG/009.01.RG41255.FAAE)

Select additional cost code(s) to view their history where applicable

Select all				
Costing level	Length	Cost code	Percent	Value
Structure	24	NAAG/009.01.RG41255.FAAE	81.920	
Structure	24	NMZC/727.01.RG44401.FAAE	18.080	

History: Research Student [Costing Levels] (No permission status)	
Effective date	Structure
01/10/2007	2: (18.08 % / NMZC/727.01.RG44401.FAAE)
01/10/2006	2: (19.61 % / NMZC/727.01.RG44401.FAAE)

Please note that mid month cost code changes will not take effect – iTrent costs for complete months only. If a mid month change is necessary the department will have to complete a journal in CUPS.

5 Position Summary

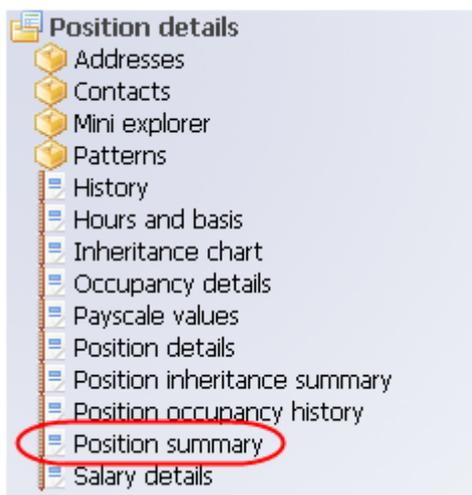
Note: This menu is not available to users who have non-pay access

The position summary screen allows you to view much of the information available from separate forms within the position menu together with information on costing, elements and terms and conditions on one screen.

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

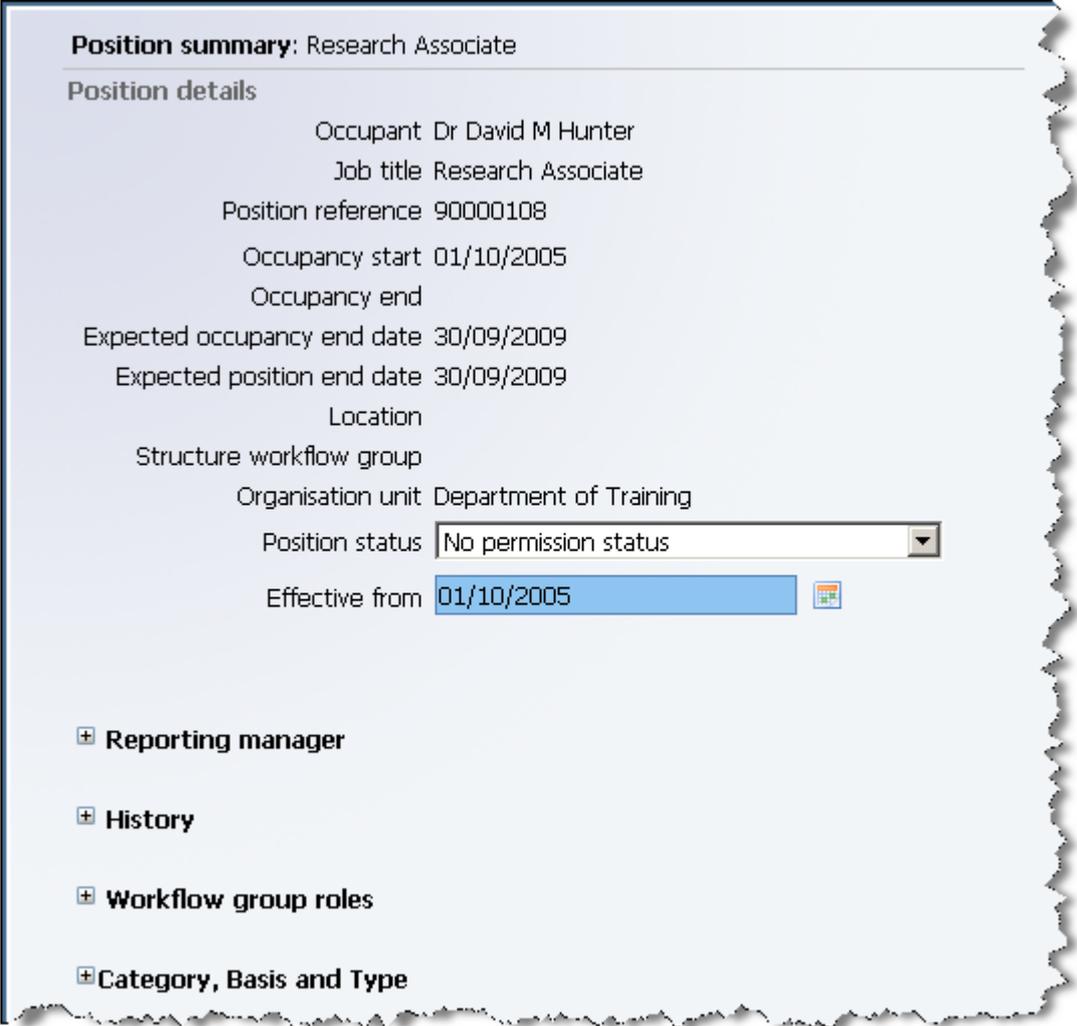
To view the position summary information:

1. Search for the person for whom you wish to view position information.
2. With their record highlighted select the Employment menu and then Positions
3. Select the Position Summary option from the position details menu



4. Enter the date for which you wish to view the position details.

5. The Position summary screen will be displayed.



Position summary: Research Associate

Position details

Occupant Dr David M Hunter
Job title Research Associate
Position reference 90000108
Occupancy start 01/10/2005
Occupancy end
Expected occupancy end date 30/09/2009
Expected position end date 30/09/2009
Location
Structure workflow group
Organisation unit Department of Training
Position status
Effective from 

+ Reporting manager

+ History

+ Workflow group roles

+ Category, Basis and Type

6. The top part of the page shows the standard information relating to this position. Occupant, Position name, Position reference, Occupancy start, Expected end date, Location, Organisation unit, Position status. The actual information displayed will be determined by what additional items have been associated with the position.
7. The lower portion of the page summarises all the information related to the position. To view details within these sections click on the expand icon . To hide details within an expanded section click on the collapse icon .

Previous occupancy details

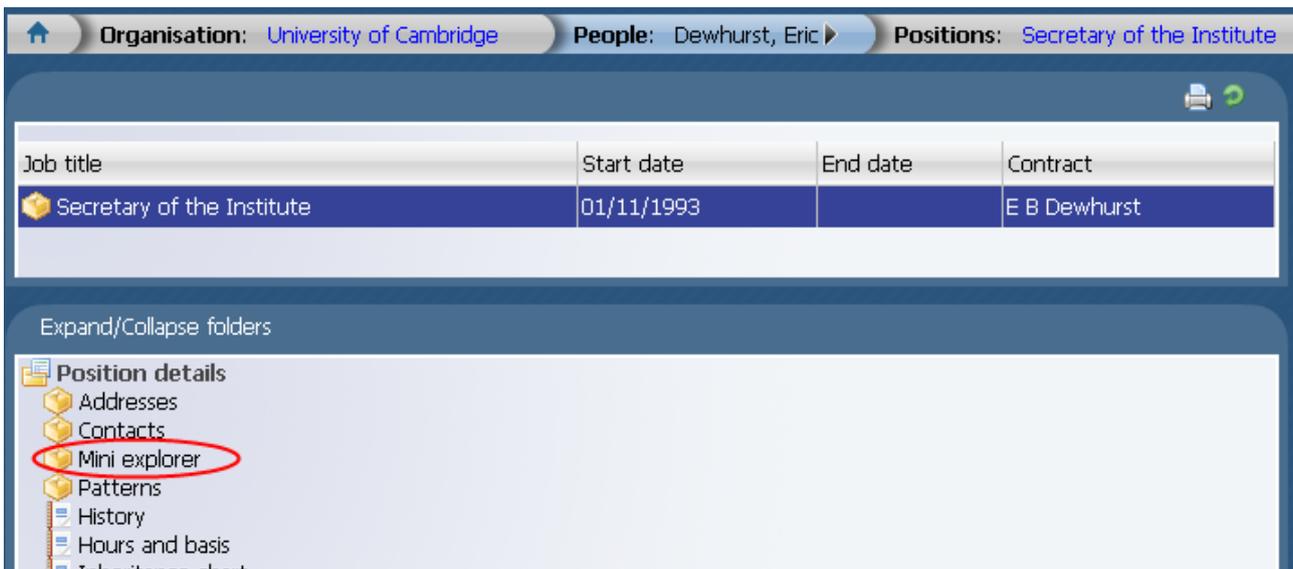
Previous occupant name Mr John E Clark
Previous occupant personal reference 10093357
Previous occupant payroll reference
Previous occupancy reference 40011987
Previous occupancy start date 15/10/2001
Previous occupancy end date 30/04/2006
Previous occupant's salary details

Note. Certain sections of this screen will only be visible if they are applicable to the position – for example the previous occupant section.

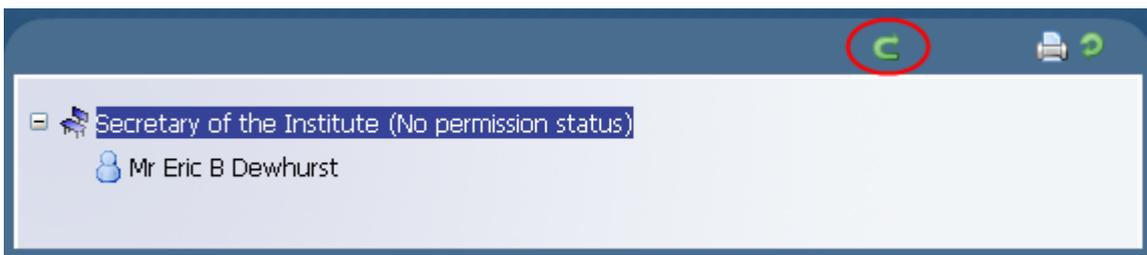
6 Position Mini Explorer

There is a feature which allows you to navigate up through the organisation structure. This allows you search for a person and locate Post information as well as Position information.

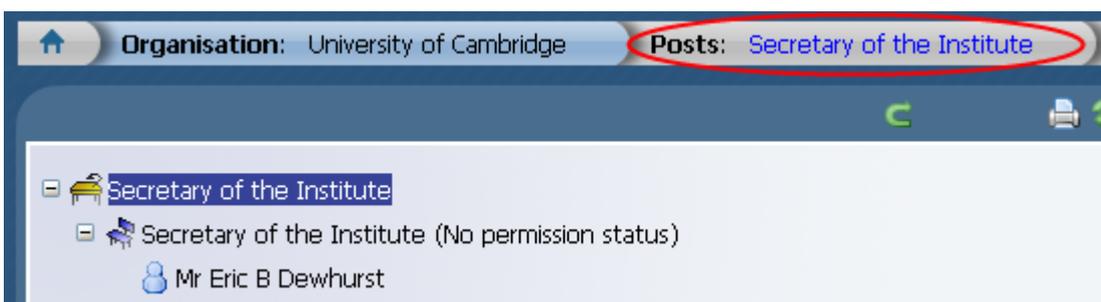
Search for and select a person, then choose Employment, Positions and select Mini explorer



The person and position will be displayed and above this an icon to 'go up 1 level'



Click on this icon to display the Post, and then select the Post on the navigation trail to display the Post reference number and the Post details menu.



7 Salary Information

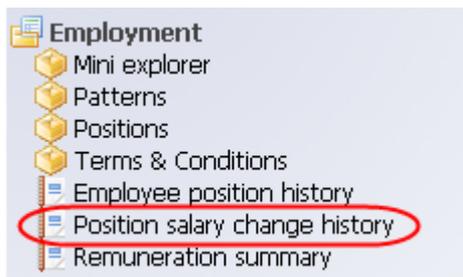
Note: This information is not available to users who have non-pay access

7.1 Position Salary change history

Navigate: **Organisation > People (Select a person) > Employment > Position Salary change history**

To view the current and previous salary information:

1. Search for the person for whom you wish to view salary information.
2. Select the Employment menu and choose Position salary change history



The position salary change history screen will be displayed. This details both cost of living increases and incremental changes. Historical information is available going back to 01/01/2006. If the person was employed prior to this date the last line of information will show their start date in the position.

If you move your mouse over a line of information a pop up box will be displayed summarising information.

Effective date	FT Salary	FTE value	Pro-rated salary	FTE hours	Grade	Payment table	Scalepoint
01/05/2008	38,019.00	1.00				National Spine	052
01/08/2007	36,911.00	1.00				National Spine	052
01/02/2007	35,836.00	1.00				National Spine	052

Effective date : **01/05/2008**
 FT Salary : **38,019.00**
 FTE value : **1.00**
 FTE hours : **37.00**
 Grade : **Grade 7**
 Payment table : **National Spine**
 Scalepoint : **052**
 Position : **Computer Associate**
 Position reference : **90000102**
 Change reason : **Payment table rate change**

Position salary change history: Mr Gilbert W Dewhurst 

Exclude payment table rate change

<input type="checkbox"/> Effective date	<input type="checkbox"/> FT Salary	<input type="checkbox"/> FTE value	<input type="checkbox"/> Pro-rated salary	<input type="checkbox"/> FTE hours	<input type="checkbox"/> Grade	<input type="checkbox"/> Payment table	<input type="checkbox"/> Scalepoint
01/05/2008	38,019.00	1.00		37.00	Grade 7	National Spine	052
01/08/2007	36,911.00	1.00		37.00	Grade 7	National Spine	052
01/02/2007	35,836.00	1.00		37.00	Grade 7	National Spine	052
01/08/2006	35,481.00	1.00		37.00	Grade 7	National Spine	052
01/03/2006	34,448.00	1.00		37.00	Grade 7	National Spine	052
01/01/2006	33,445.00	1.00		37.00	Grade 7	National Spine	051
01/03/2005		1.00		37.00			

7.2 Salary details and Payscale values

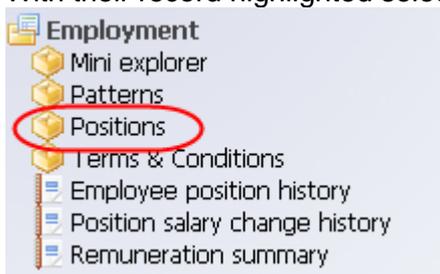
Salary information may also be viewed, along with details of next increment date from the positions menu. The Salary details screen is used for “spot” salaries which are not on the Single Salary Spine – for example Studentships. All details for employees who are Grade 1 through to 12 can be viewed from the Payscale values screen.

7.2.1 Salary details

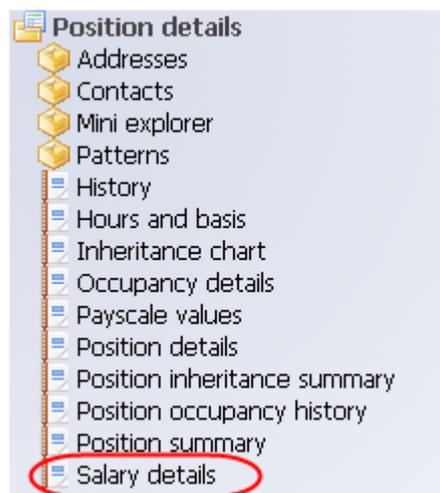
Salary details for employees who are not paid on the Single Salary Spine can be found on this screen.

Navigate: Organisation > People (Select a person) > Employment > Positions > Salary Details

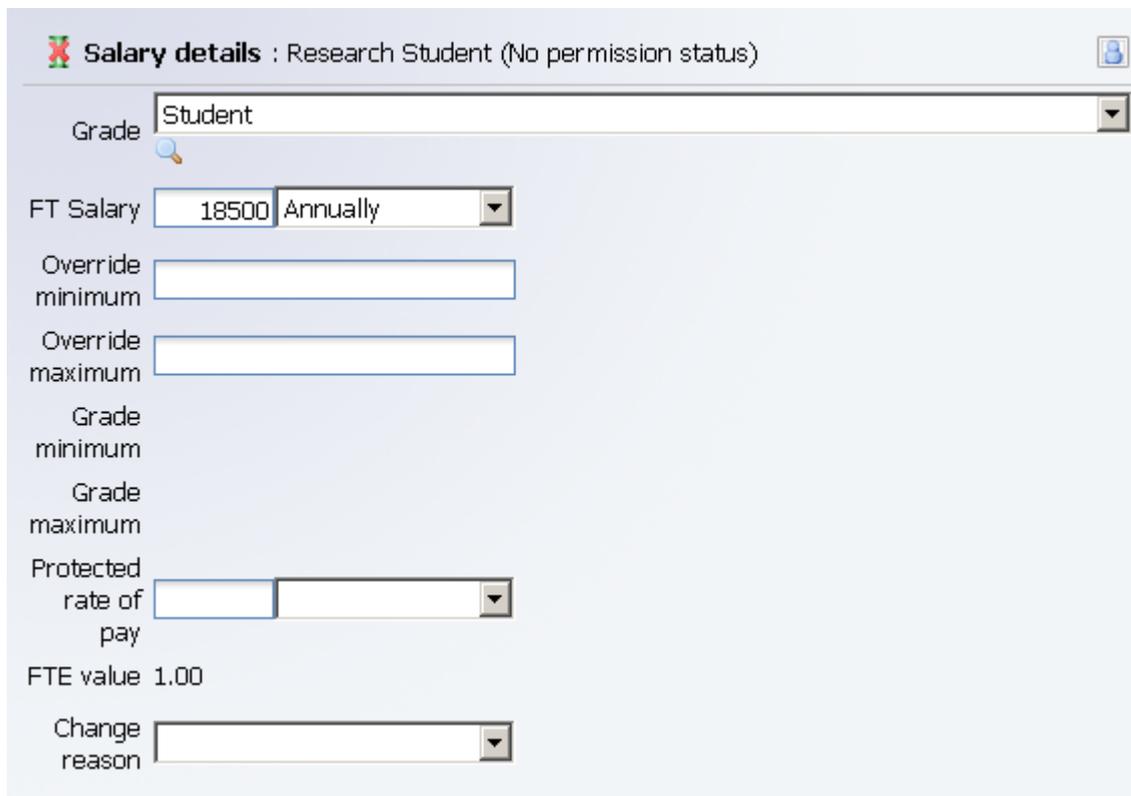
1. Search for the person for whom you wish to view salary information.
2. With their record highlighted select the Employment menu and then select Positions



3. Select the job title for which you wish to view information
4. Select Salary details



5. Enter the effective date
6. Salary details will be displayed



Salary details : Research Student (No permission status)

Grade: Student

FT Salary: 18500 Annually

Override minimum:

Override maximum:

Grade minimum:

Grade maximum:

Protected rate of pay:

FTE value: 1.00

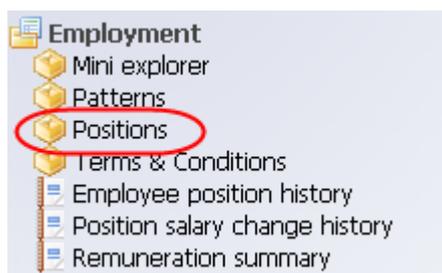
Change reason:

7.2.2 Payscale Values

Salary details for employees who are paid on the Single Salary Spine can be found on this screen.

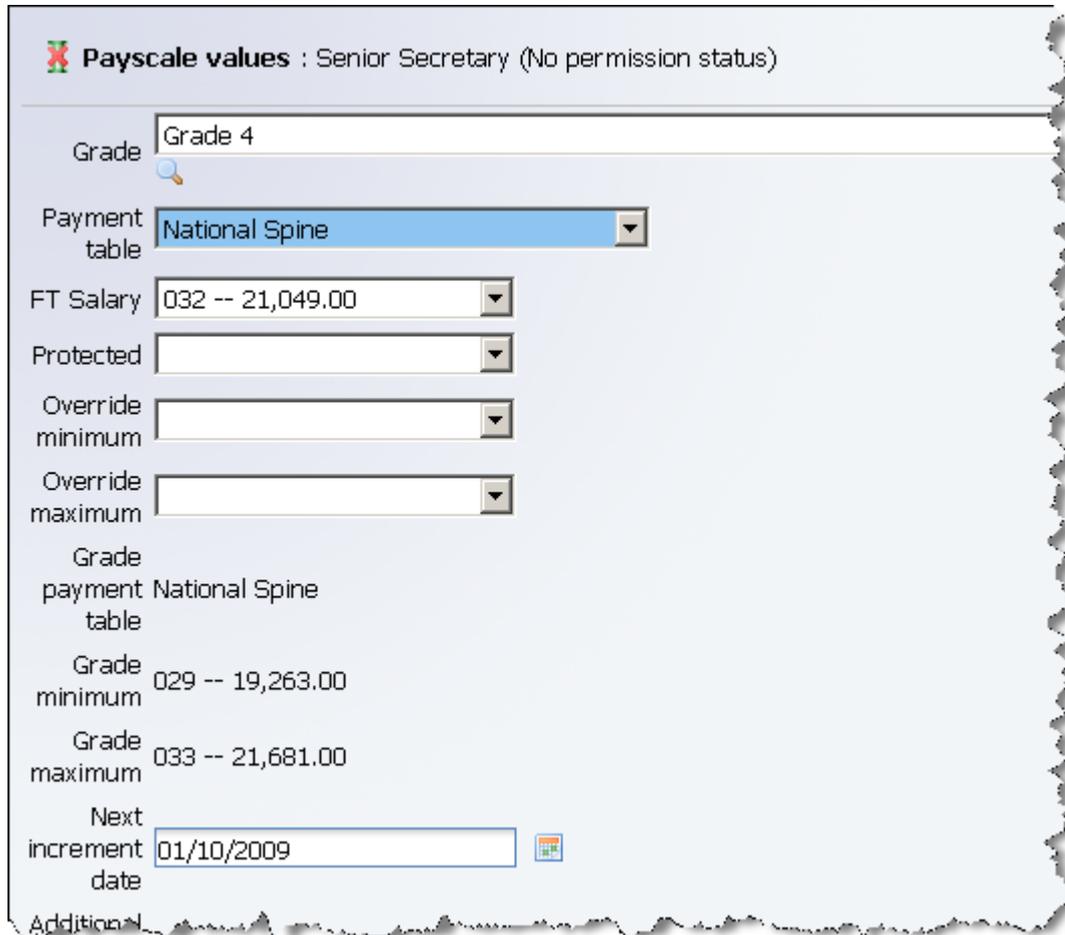
Navigate: Organisation > People (Select a person) > Employment > Positions > Payscale values

1. Search for the person for whom you wish to view salary information.
2. With their record highlighted select the Employment menu and then select Positions



3. Select the job title for which you wish to view information
4. Select Payscale values

- 5. Enter the effective date
- 6. The Payscale values will be displayed.



Payscale values : Senior Secretary (No permission status)

Grade

Payment table

FT Salary

Protected

Override minimum

Override maximum

Grade payment table National Spine

Grade minimum 029 -- 19,263.00

Grade maximum 033 -- 21,681.00

Next increment date

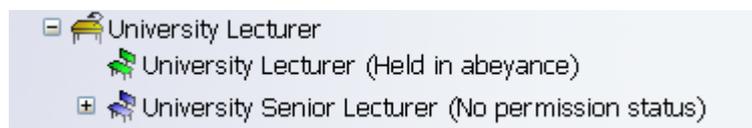
Additional

Note: The grade maximum displayed on this screen is the maximum service point (ie contribution points are above this value)

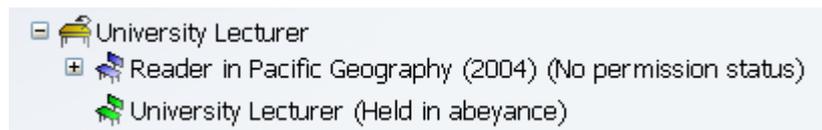
8 Senior Academic Promotions

Within the Trent organisation structure of the University there is a post for each position.

However, for certain academic promotions this will be displayed as one post with two positions where the underlying position remains vacant. For example where a Lecturer is promoted to a Senior Lecturer or Reader, a new position is created under the post of University Lecturer, and the position of Lecturer remains, (with a position status of Held in Abeyance) as this would be the post and position into which a replacement would be recruited.

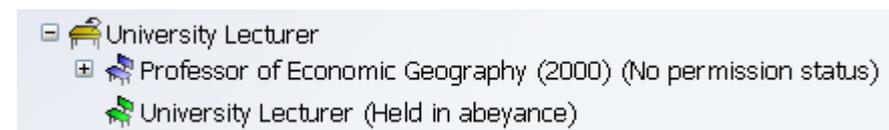


- University Lecturer
 - University Lecturer (Held in abeyance)
 - University Senior Lecturer (No permission status)



- University Lecturer
 - Reader in Pacific Geography (2004) (No permission status)
 - University Lecturer (Held in abeyance)

Where a Senior University Lecturer is further promoted to a Reader, or a Reader is further promoted to a Professor the previous position will be ended. For example below the current occupant has been promoted from a Reader to a Professor, but when the occupant is transferred into the Professor position the Reader position is ended, leaving the University Lecturer position in abeyance.



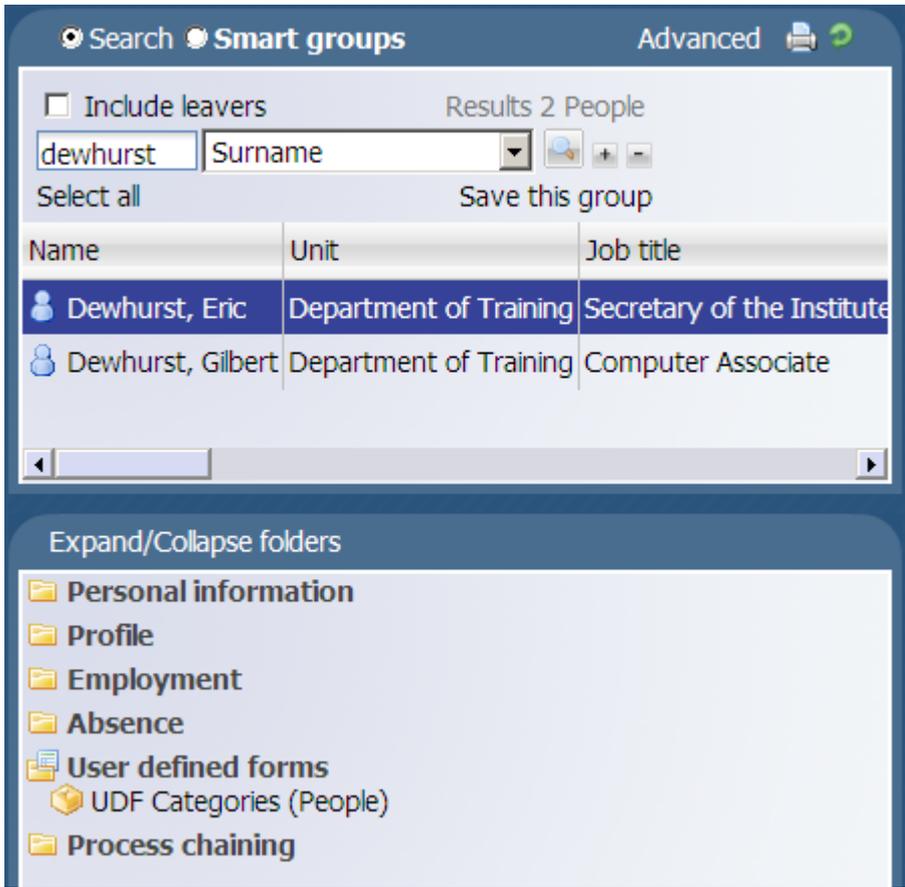
- University Lecturer
 - Professor of Economic Geography (2000) (No permission status)
 - University Lecturer (Held in abeyance)

9 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.” Institutional users can access the information held in User Defined Forms at both personal and position level for people within their school or department. Some of this information is used only for the Roll of the Regent House, or by certain members of the contract teams.

9.1 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



The screenshot shows the CHRIS search interface. At the top, there are search options: 'Search' (selected), 'Smart groups', and 'Advanced'. Below this, there is a search filter for 'Surname' with the value 'dewhurst'. The results show two people: Eric Dewhurst (Secretary of the Institute) and Gilbert Dewhurst (Computer Associate). The 'User defined forms' menu option is highlighted in the left-hand navigation pane.

Name	Unit	Job title
Dewhurst, Eric	Department of Training	Secretary of the Institute
Dewhurst, Gilbert	Department of Training	Computer Associate

Expand/Collapse folders

- Personal information
- Profile
- Employment
- Absence
- User defined forms
 - UDF Categories (People)
- Process chaining

3. Select UDF Categories (People)

4. The list of UDF Categories will be displayed

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)

5. In the column headed “No. of rows”, a 1 indicates that a record is held. To view details select the row – in this example Red circle status

 Personal Roll Details	1
 Red circle status	1
 Removal Expenses Eligibility	0

Expand/Collapse folders

-  UDF Categories
 -  UDF Details (People)

and select UDF Details (People) menu.

- The details will be displayed

Status	Date start	Date end
Yes	01/07/2006	

9.2 Accessing position information in User Defined Forms

- Search for the person for whose position you wish to view user defined information.
- Select the person and choose Employment, Positions
- Select the User Defined Forms menu



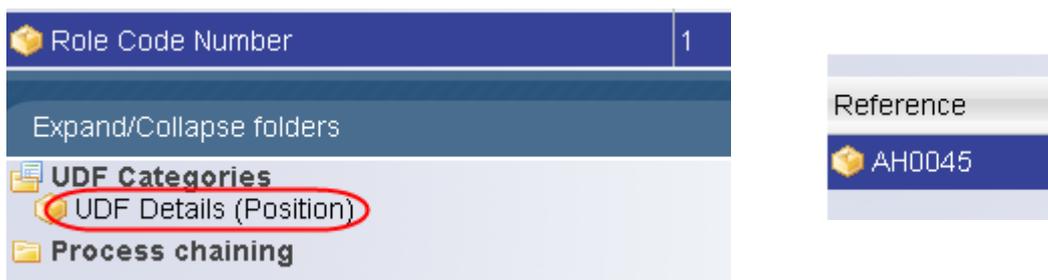
- Select UDF Categories (Position) to display the list of UDFs at position level

UDF category	No. of rows
Invigilator Rate	0
NHS Trust Information	0
Permission to create	0
Role Code Number	1
University Office	0

Expand/Collapse folders

- UDF Categories
 - UDF Details (Position)
- Process chaining

- To view specific details (in this example Roll Code Number) select the Category and then select UDF Details (Position)

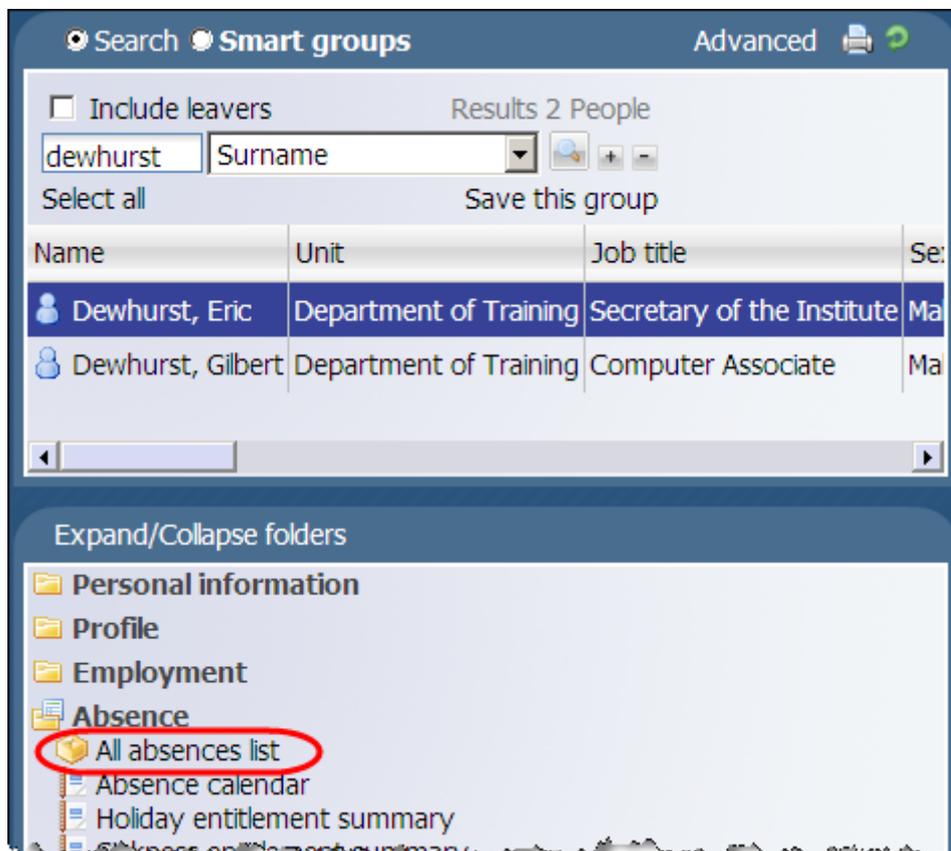


10 Absence

Absences within Trent are created in groups. Each group defines a generic type of absence – Holiday, Sickness, Maternity, Paternity and Other. Each group is also linked to one or more Absence Types where you can further define the type of absence (e.g. absence types of sabbatical and unpaid leave within the group ‘other’)

Where absence details have been entered you can view them by accessing an employee’s personal absence list.

1. Search for the person for whom you wish to view absence information.
2. With their record highlighted select the Absence menu and then All absences list



3. All recorded absences will be displayed in the object pane with the most recent absence displayed first

Search Smart groups Advanced

Show all Absence group All

Start date	Day	End date	Day	Type
01/12/2008	Mon	08/12/2008	Mon	Sickness Scheme
17/06/2008	Tue	18/06/2008	Wed	Sickness Scheme
23/04/2008	Wed	23/04/2008	Wed	Sickness Scheme
10/03/2008	Mon	10/03/2008	Mon	Unpaid leave - Other

- To view details for an absence, select the absence from the list and select Absence details.

Sickness absence details: Mr Gilbert W Dewhurst

Absence start

Date

Type

Absence end

Date

Type

Expected end date

Absence

Absence type

Absence reason

Position Computer Associate

5. Different information will be displayed in the absence details depending on the Absence Group. In this example maternity absence details are displayed

Absence dates	
Expected birth date	<input type="text" value="12/05/2008"/>
Issue date of MATB1	<input type="text"/>
Calculated maintenance details	
Expected week of childbirth	11/05/2008
Earliest MPP start	24/02/2008
Qualifying week commences	27/01/2008
Earliest allowed MATB1 date	23/12/2007
Key maternity dates	
Maternity absence start date	<input type="text" value="14/04/2008"/>
Maternity absence end date	<input type="text"/>
Expected end date	<input type="text"/>
MPP start date	<input type="text" value="14/04/2008"/>
MPP end date	11/01/2009
OML end date	12/10/2008
AML end date	12/04/2009
Additional information	

Sickness Absence recording

Departmental staff now have the opportunity to be able to update sickness absence records on Trent themselves. This is being rolled out by School at the moment. If Departments are able to input a year's sickness history into the system for all employees, then the CHRIS/63 form for long term sick leave will no longer need to be completed and sent to HR.

There is separate user documentation for absence recording. If you are interested in obtaining update access for sickness absence recording, please contact the CHRIS Helpdesk: chrishelpdesk@admin.cam.ac.uk