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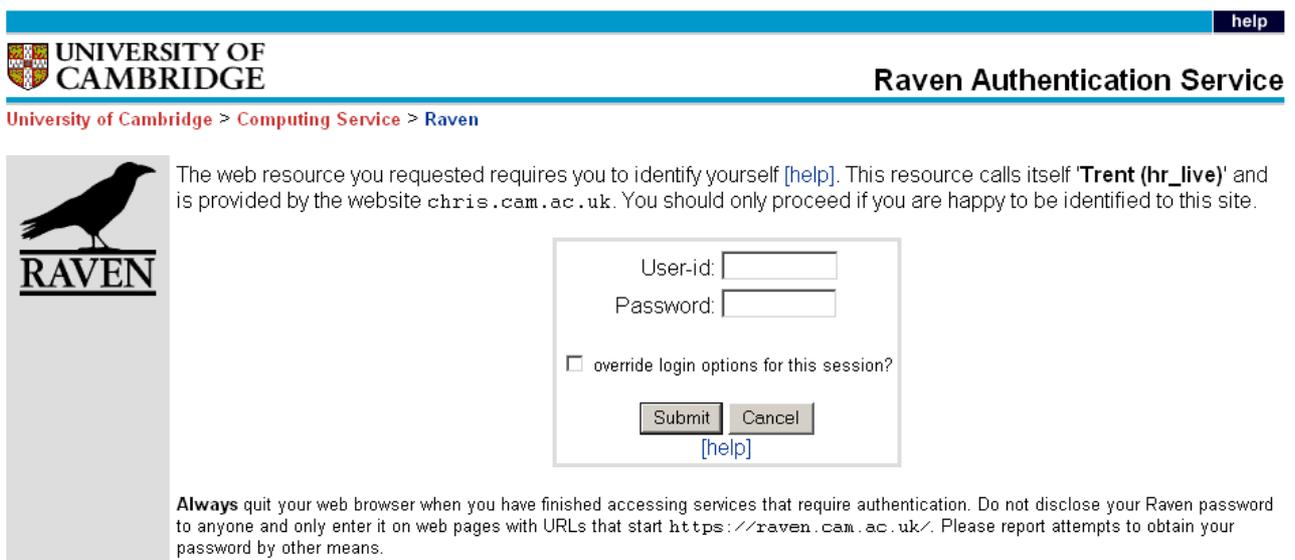
1 Introduction

The University of Cambridge has identified the need to replace its software systems in its Human Resources (SECQUS) and Payroll functions. The project to bring about this change is called **C**ambridge **H**uman **R**esources **I**nformation **S**ystem (**CHRIS**) and the new software system that will be introduced as a replacement is called Trent.

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

1.1 The Login screen

Locate the Trent icon on your desktop. When you click on the shortcut, 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 > 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.



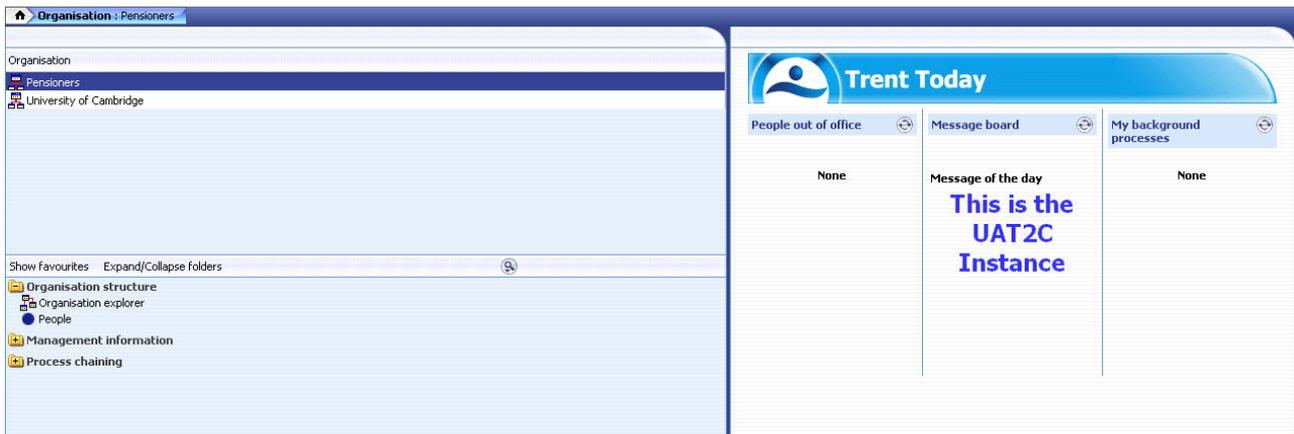
The Raven web authentication system is provided and managed by the [University Computing Service](#).
© 2007 University of Cambridge Computing Service

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



1.2 Trent Today

When you first logon to Trent or if you click the Home icon , the Trent Today page will be displayed.



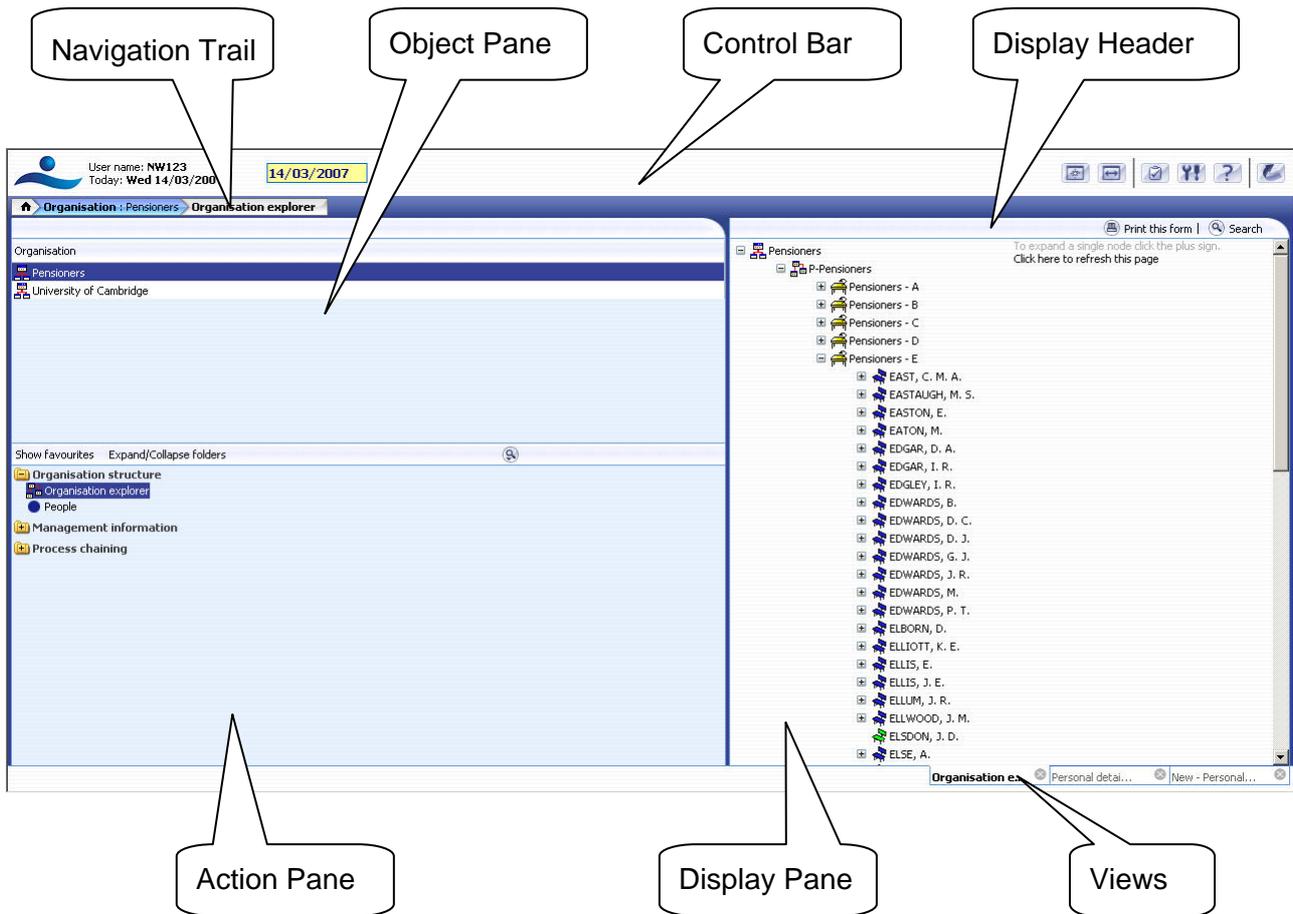
The Trent Today page will display the following information:

People out of office 	Message board 	My background processes 
<p>This column will list all of the people who report to you who have been identified to Trent as being out of office.</p> <p>People are identified as being out of office by having an Absence recorded in Trent or by being scheduled on a Training event.</p>	<p>This column will display any System Alert or Message of the day that is current</p>	<p>This column will display any background processes that have been completed in the last 24 hours.</p> <p>Background processes are run for Reports, Payroll calculations etc.</p>

Each column has a refresh icon  which when clicked will attempt to refresh the column with any new information that may be available.

1.3 The Trent Screen

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



1.3.1 The Control Bar



Item	Action	Keyboard Shortcut	Information
User Name			The username you have logged on with
Today			Today's Date
01/08/2006	Effective Date	Alt + E	Many of the processing tasks within Trent 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.
	To do list	Alt + T + Enter	When this is clicked you can see any workflow tasks that have been sent to you to carry out. A new panel opens up to the left of the navigation area.
	My settings	Alt + M + Enter	When this is clicked you can personalise some of the display formats including the font size that Trent is using.
	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 Trent. (Note this icon does not appear for users accessing Trent via Firefox. Firefox users will need to logout by closing the browser window / tab, not by clicking the icon.)

1.3.2 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).



1.3.3 Object Pane

Search Smart groups Advanced

Surname Results 10 People

Select all Save this group

Name	Unit	Job title	Sex	Date of birth	Social security no.	Per
Abbott, Alexandra	P-Pensioners	WOOLEY, J.	Female	19/02/1938	ZRTY875748B	X94
Abbott, Kate	P-Pensioners	SQUIRES, M. J.	Female	02/06/1935	ZLEQ319964E	X95
Abbott, Louise	P-Pensioners	JENKINS, D. M.	Female	25/05/1922	LWMT677215T	X22
Abbott, Michelle	P-Pensioners	DYE, J.	Female	25/04/1943	ZABM858466R	X12
Abbott, Nathalie	P-Pensioners	JONES, T. Z.	Female	22/04/1945	WMXC618848X	X25
Abbott, Pauline	P-Pensioners	PETTIT, M. P.	Female	09/11/1930	LRJN348983U	X81
Abbott, Philis	P-Pensioners	GRAY, A.	Female	03/07/1936	ZMCC158123Y	X55

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.

1.3.4 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 blue globe 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 diamond 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.

1.3.5 Display Pane

Address details: Professor Alexandra L Abbott		Name: Professor Alexandra L Abbott		Job title: WOOLEY, J.	
		Social security number: ZRTY875748B		Pay ref: X9428809	
				Pers ref: X9428809	
Address type	Home/ Personal				
Mailing address	<input checked="" type="checkbox"/>				
House Name	329, Chesterton Road				
Number/Street	<input type="text"/>				
Local Area	<input type="text"/>				
POSTTOWN	<input type="text"/>				
COUNTRY	Frinton				
POSTCODE	FR4 3IS				
Country	United Kingdom				
Start date	06/02/1998				
End date	<input type="text"/>				
<input type="button" value="Save"/>			<input type="button" value="Delete"/>		

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.

1.3.6 Display Header

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

-  **Print this form** Sends the page from the display pane to the selected printer.
-  **Form history** Displays the form history details page.
-  **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 where information has been entered

1.3.7 Views

If you click the New View icon  Trent 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.

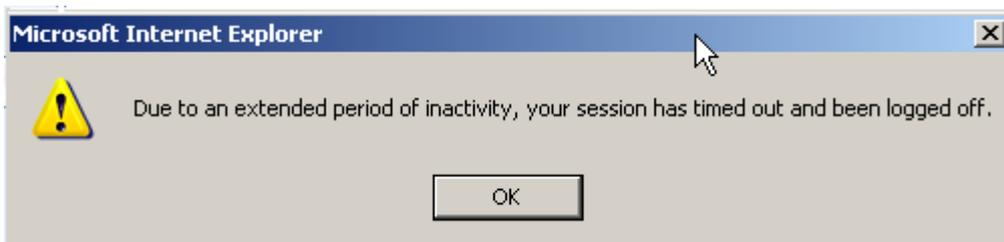
The tabs to access the views are shown at the bottom right of the Display Pane. You can create up to 6 views.

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

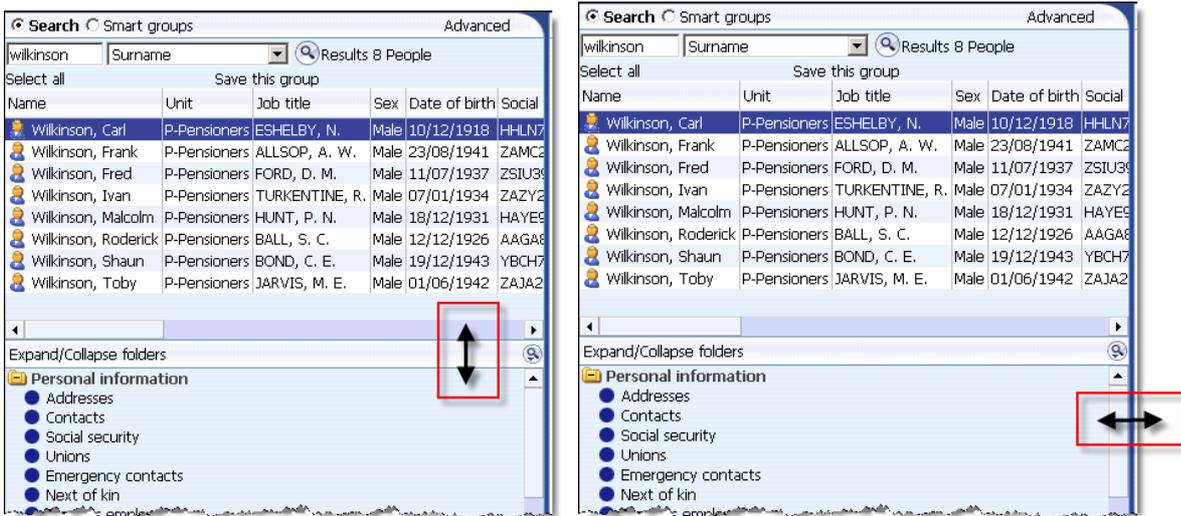
If there is a period of 20 minutes inactivity whilst using Trent then when you next attempt to access data the following message will be displayed.



Please note that any unsaved data will be lost.

1.5 Resizing Areas

You can resize the areas of Trent by moving the cursor to a dividing edge and letting the cursor change into a double arrow. Hold the cursor down and adjust accordingly.



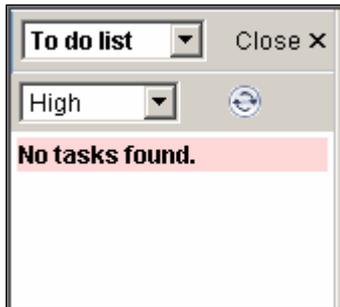
Vertical adjustments will show this cursor:



Horizontal adjustments will show this cursor:

1.6 To do List

The To do List is displayed when you click on the  icon or press Alt + T followed by enter.



Currently you will be informed that no tasks are found.

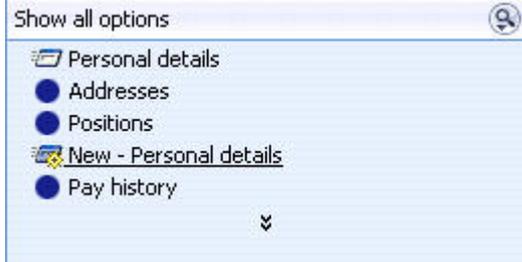
We will be making greater use of this function later in the project.

1.7 My Settings

You may set some of the Trent defaults that you prefer to use by selecting this button  or pressing Alt + M followed by Enter.

Defaults	
Date effective field prompt	<input checked="" type="checkbox"/>
Person search field	Surname
People identity tags	<input checked="" type="checkbox"/>
Photo in identity tags	<input checked="" type="checkbox"/>
Use favourites	<input checked="" type="checkbox"/>
Number of favourites to display	10
No. of levels for out of office	1
Automatically select default action	<input type="checkbox"/>
Font Family:	Tahoma
Font size: (Drag slider)	
The quick brown fox jumps over the lazy dog.	
Mandatory field colour	

Workflow	
Search for new tasks every (seconds)	60
Notify of new tasks at logon	<input checked="" type="checkbox"/>
Notify as new tasks arrive	<input checked="" type="checkbox"/>
Number of days showing completed tasks	2
People manager reporting levels	999
Save	

<p>My Settings – Date effective Field prompt</p>	<p>If you tick this box then every time an effective date is required, Trent will prompt you for one. If this box is not checked then you can enter a date in the Effective Date field at the top of the screen which will be used until you change it.</p> <p>It is strongly advised that you tick this box.</p>
<p>My Settings – Person search field</p>	<p>This field provides the default search option field. It is still possible to search by criteria other than the default by clicking the drop down arrow.</p> 
<p>My Settings – People Identity Tags</p>	<p>If you tick this box when detail records are displayed they will also include a ‘tag’ of information that identifies the employee. This may include: Name, Personal reference, N.I. number, job title etc. For example:</p> 
<p>My Settings – Use Favourites</p>	<p>Enables favourite pages to be displayed.</p> <p>This will show the most recently used navigation items rather than the complete list. The number of items shown will depend on the next option – number of favourites to display.</p>  <p>Click on the double arrows  underneath the list of favourites to show the complete list</p>

My Settings – Number of favourites to display	Sets the maximum number of your favourite Trent pages to display
My Settings – Number of levels for out of office	Sets the number of levels of People out of office that will be displayed on the initial Trent Today page. A setting of 1 will display just those who report directly to you. A setting of 2 will display those who report to you and those that report to them and so on. We are not initially making use of this feature.
My Settings – Automatically select default action	<p>If you tick this box when you navigate to a page that will display in the Object pane a list of details, for example Address details, NI details, if there are no details to be displayed it will automatically open the New Page to allow you to create a new item. If the Object pane does have items in the list it will by default open the top item in the list.</p> <p>If this option is not ticked then Trent will behave unchanged.</p>
My settings – Font Family	Sets the font to be used by Trent; choose from Tahoma, Verdana, Arial, Times or Comic Sans MS.
My Settings – Font Size	Adjusts the size of the font that Trent will use. Click the pointer and whilst holding the mouse key down, move the pointer left or right. The selected font size is displayed in the box below the pointer.
My Settings – Mandatory field colour	Allows you to change the colour of all mandatory fields. Click on the circle colour icon.
My Settings – Workflow	These features will be made use of later in the project implementation:
Search for new tasks every (seconds)	If you set this value then at the specified interval Trent will check to see if you have any new workflow tasks.
Notify of New Tasks at logon	If you tick this box any new workflow tasks will be presented to you each time that you logon to Trent.
Notify as new tasks arrive	If you tick this box any new workflow tasks will be presented to you during your current session of Trent.
Number of days showing completed tasks	You can set the number of days that any completed tasks should remain in the display before they are removed.

1.8 Help and Documentation

1.8.1 Activating Help

On-line help is provided within Trent. To access help click the help button  on the Trent control bar. Trent 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 Trent screen will be reduced from the right and the Trent on-line help will be started in a separate window next to the Trent application. If required you can resize or reposition either the Trent screen or the Help screen as required. When you close the on-line help, the Trent screen will resize itself back to its original settings.

1.8.2 Controlling Help

The following buttons are available on the help toolbar.

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

2 Navigation



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



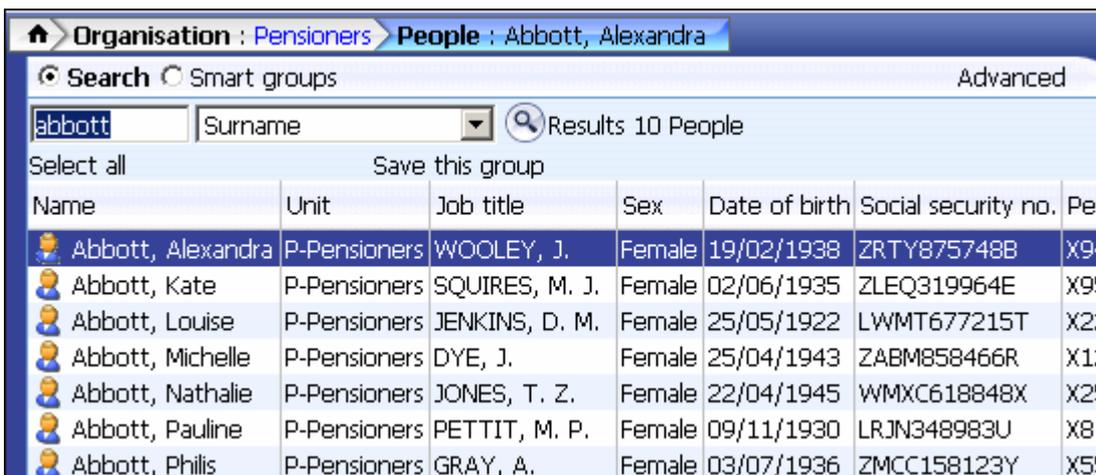
This trail shows the way in which information has been grouped and allows you to move between these groupings.

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

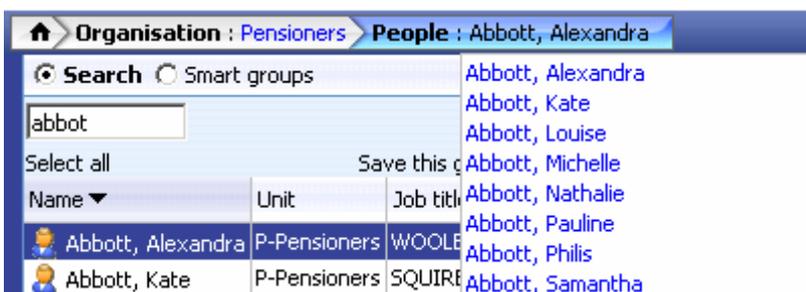
2.1 Navigation Trail



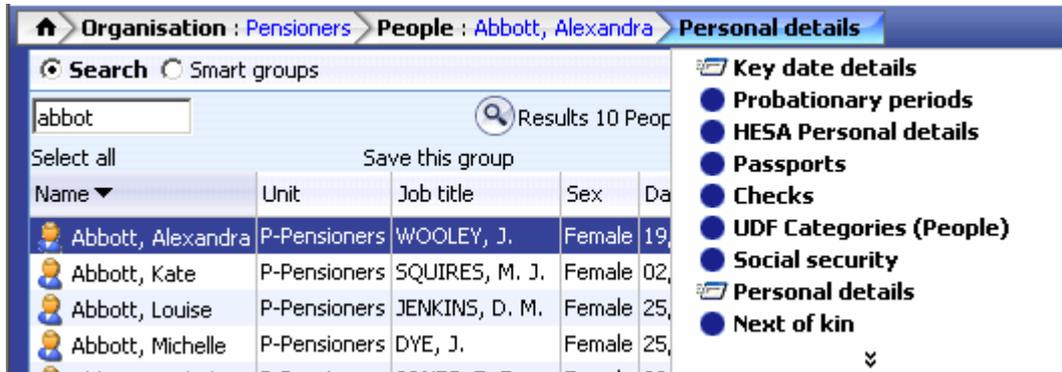
The items shown on the navigation trail in black and bold are the navigation items that you have selected (Organisation, People, Personal details). The items in blue show the current selection within the navigation item (Pensioners, ABBOTT, Alexandra). You can click on any of the items shown in the list 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 pensioner’s name, ABBOTT, Alexandra, 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 ABBOTT, Kate the next person in the list and view his/her details.



If you right click on any of the black and bold items in the navigation trail for example, **Personal Details**, 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 Next of Kin for example, Trent will then display the Next of Kin 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 My 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
	<p>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.</p>
	<p>The Blue globe indicates that there are further items of detail required before a page can be displayed.</p> <p>For example, if you click on the Addresses item:</p> <div data-bbox="336 1205 742 1635" style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px;"> <p> Personal information</p> <ul style="list-style-type: none">  Addresses  Social security  Emergency contacts  Next of kin  Previous employments  Remuneration  Employment history  Personal details  Key date details  Address history  Position salary change history  New - Personal details </div> <p>Trent will then display the forms available in that category of data, in the Object pane enabling you to select an existing address or to view address history.</p>
	<p>The Page icon indicates that the item is a page that is available to you which will be displayed in the display pane.</p>

3.1 Searching the navigation items

To help you locate the required menu option or form within the Action Pane there is a search facility. This is enabled by clicking the search icon in the Action Pane Header



Enter the action you require (in this example work permits) and click the search icon or press enter



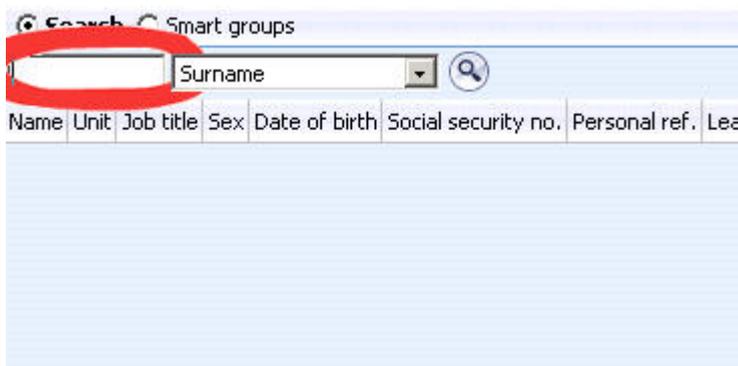
Click on the navigation route you wish to follow



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



Click on the red ringed menu option and Trent will guide you to the next step



Complete the next step (in this example entering a surname)

Trent will navigate to the next step, again red ringing the item in order for you to locate and select it



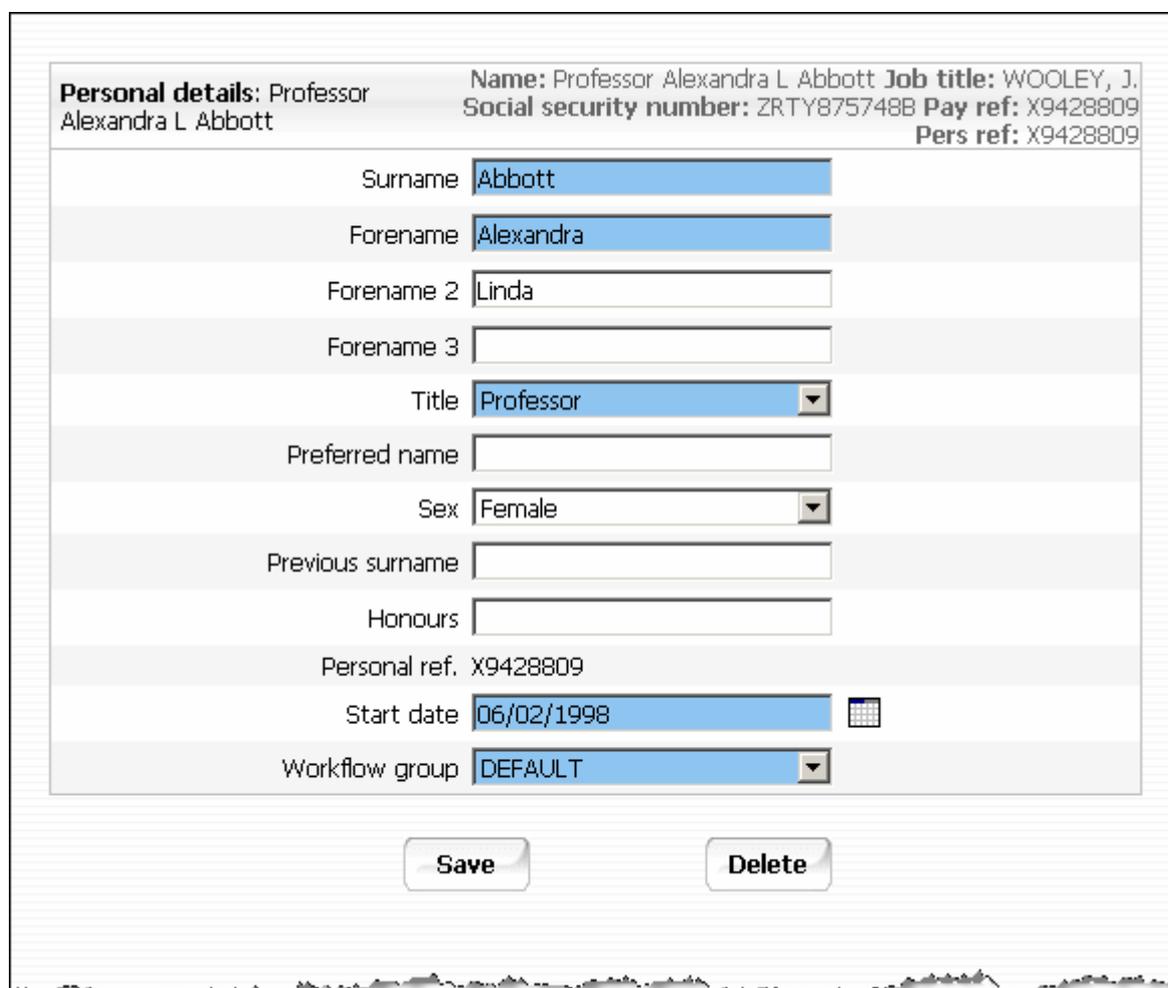
Navigating through the menus can also be made a simplified process by making use of 'Screen Chaining'. This is a process that allows a user to progress through a pre-defined sequence of menus and pages to input data – for example personal details, address details, social security details for a new starter. Process chains are a new facility and make use of workflow functionality which will be utilised at a later phase of the CHRIS project.

4 Display Pane

The Display pane is where you will see most of the displayed results and perform changes to the data.

4.1 Basic Page details

The Personal Details page, shown below, shows some of the features available.



Personal details: Professor Alexandra L. Abbott	Name: Professor Alexandra L. Abbott	Job title: WOOLEY, J.
	Social security number: ZRTY875748B	Pay ref: X9428809
		Pers ref: X9428809
Surname	Abbott	
Forename	Alexandra	
Forename 2	Linda	
Forename 3		
Title	Professor	
Preferred name		
Sex	Female	
Previous surname		
Honours		
Personal ref.	X9428809	
Start date	06/02/1998	
Workflow group	DEFAULT	

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 Trent:

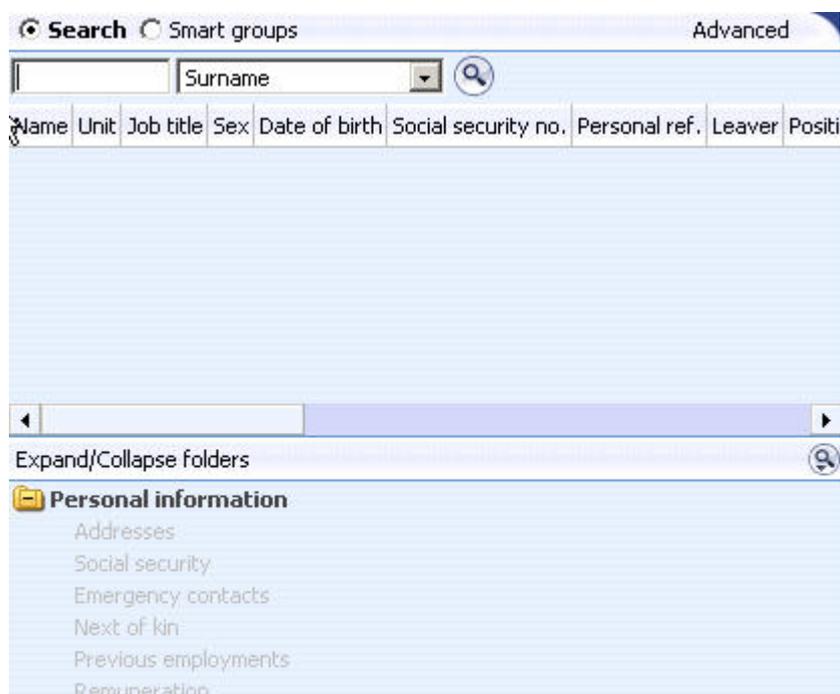
Display Method	Usage
<input checked="" type="checkbox"/> check box (checked) <input type="checkbox"/> check box (not checked)	<p>A check box is used to denote a condition which can only be true or false. When the box is checked the condition is true.</p> <p>When the box is not checked the condition is false</p>
<div style="border: 1px solid black; width: 100px; height: 20px; margin-bottom: 10px;"></div> Text box (non mandatory) <div style="background-color: #ADD8E6; border: 1px solid black; width: 100px; height: 20px;"></div> Text box (mandatory)	<p>A text box is used to display alphanumerical information. If the information is editable you may overwrite any existing text to make changes.</p> <p>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 coloured background.</p>
<div style="border: 1px solid black; width: 100px; height: 20px; position: relative;"> ▼ </div> Drop down list <div style="background-color: #ADD8E6; border: 1px solid black; width: 100px; height: 20px; position: relative;"> ▼ </div> Drop down list (mandatory)	<p>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.</p> <p>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 ▼</p>
 Search	Initiates a search, used to select the data for the field to the left of the icon.
<div style="background-color: #D3D3D3; padding: 5px; border: 1px solid black;"> Age (years) 61 Age (months) 2 Date 08/07/2012 </div> Display only fields	The data contained in these fields are edited elsewhere in Trent, 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
<p>Expiry date <input data-bbox="288 483 647 524" type="text"/></p> <p>Date Field</p>	<p>Date fields accept a number of formats.</p> <p>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</p> <p>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.</p> <p>Entering t and pressing the tab key will enter today's date.</p> <p>An alternative method of entering a date is to use the calendar option, which can be found at the end of every date field.</p>
<p> Calendar</p>	<p>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.</p>

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



The screenshot shows the CHRIS Simple Search interface. At the top, there are two radio buttons: "Search" (selected) and "Smart groups". To the right is a link for "Advanced". Below this is a search input field with a search icon. The input field contains the text "Surname". To the right of the input field is a dropdown menu with a search icon. Below the search input is a table with the following columns: Name, Unit, Job title, Sex, Date of birth, Social security no., Personal ref., Leaver, and Position. The table is currently empty. Below the table is a horizontal scrollbar. At the bottom, there is a section titled "Expand/Collapse folders" with a search icon. Underneath this section is a folder icon and the text "Personal information". Below "Personal information" are several sub-items: Addresses, Social security, Emergency contacts, Next of kin, Previous employments, and Remuneration.

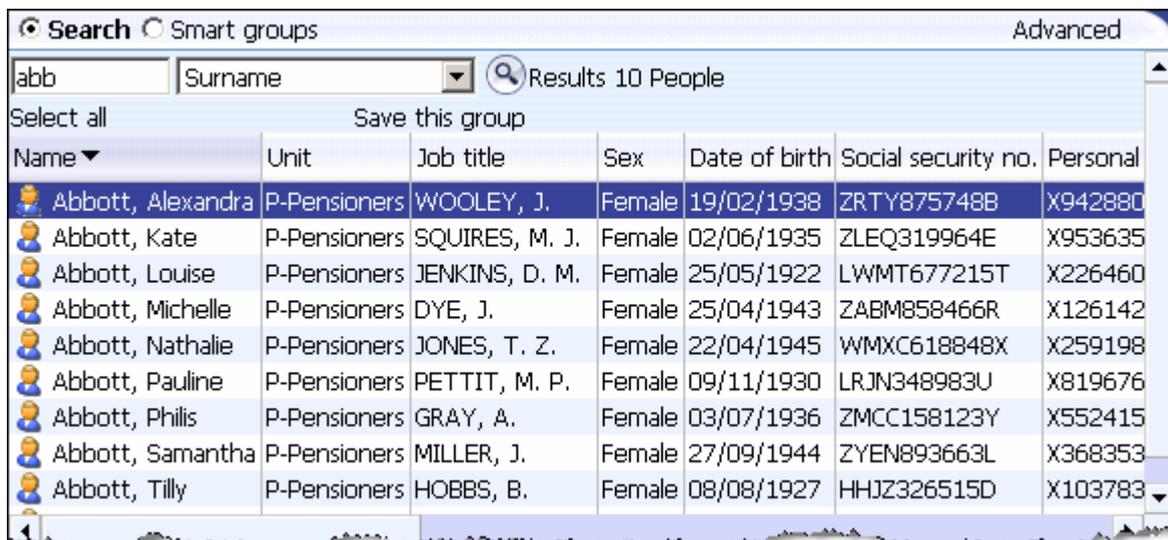
In most searches you will have one text box to enter your search criteria and next to it there will be a condition. In the example shown you are searching for a name and the name is to be found in the Surname field. The drop-down list next to Surname will show you the alternative fields that are available 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.

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



The screenshot shows a search interface with a search box containing 'abb' and a dropdown menu set to 'Surname'. The results pane shows 10 people. The table below represents the data shown in the screenshot.

Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal
Abbott, Alexandra	P-Pensioners	WOOLEY, J.	Female	19/02/1938	ZRTY875748B	X942880
Abbott, Kate	P-Pensioners	SQUIRES, M. J.	Female	02/06/1935	ZLEQ319964E	X953635
Abbott, Louise	P-Pensioners	JENKINS, D. M.	Female	25/05/1922	LWMT677215T	X226460
Abbott, Michelle	P-Pensioners	DYE, J.	Female	25/04/1943	ZABM858466R	X126142
Abbott, Nathalie	P-Pensioners	JONES, T. Z.	Female	22/04/1945	WMXC618848X	X259198
Abbott, Pauline	P-Pensioners	PETTIT, M. P.	Female	09/11/1930	LRJN348983U	X819676
Abbott, Philis	P-Pensioners	GRAY, A.	Female	03/07/1936	ZMCC158123Y	X552415
Abbott, Samantha	P-Pensioners	MILLER, J.	Female	27/09/1944	ZYEN893663L	X368353
Abbott, Tilly	P-Pensioners	HOBBS, B.	Female	08/08/1927	HHJZ326515D	X103783

Search item = abb

Returns 10 people whose surname starts with 'abb'

Search Smart groups Advanced

*man Surname Results 47 People

Select all Save this group

Name	Unit	Job title	Sex	Date of birth	Social security no
Chapman, Edward	P-Pensioners	WOODWARD, J. M. A.	Male	18/12/1938	ZXXA424222T
Chapman, Eric	P-Pensioners	SMITH, C. H.	Male	20/12/1938	ZTSS871972Q
Chapman, Gerald	P-Pensioners	PAYNE, B. D.	Male	02/02/1936	ZMRD445653E
Chapman, Melvin	P-Pensioners	SPONG, E. R.	Male	15/11/1935	ZMVU627298B
Chapman, Oliver	P-Pensioners	BLOOR, A.	Male	27/06/1924	RMEH495756L
Chapman, Roderick	P-Pensioners	CULLUM, R. H.	Male	27/05/1922	CKNG489532A
Chapman, Toby	P-Pensioners	LONGOBARDI, A.	Male	15/08/1940	YBSM673432V
Lawman, Margaret	P-Pensioners	SCRIPPS, V.	Female	24/12/1941	ZYVW412529R
Lawman, Samantha	P-Pensioners	TOOGOOD, J. M.	Female	04/11/1935	ZMAD999399U

Search item = *man

Returns 47 people whose surname contains the text 'man'

Search Smart groups Advanced

abbot* Surname Results 0 People

Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal ref.	Leaver	Position referer
------	------	-----------	-----	---------------	---------------------	---------------	--------	------------------

Search item = abbot*

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

When using this method of searching, the effective date is not a factor in the search; therefore should you search by surname, you may also find Pensioners who have been made a leaver (i.e. upon death). Using an Advanced search is a more accurate way of finding current Pensioners.

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).

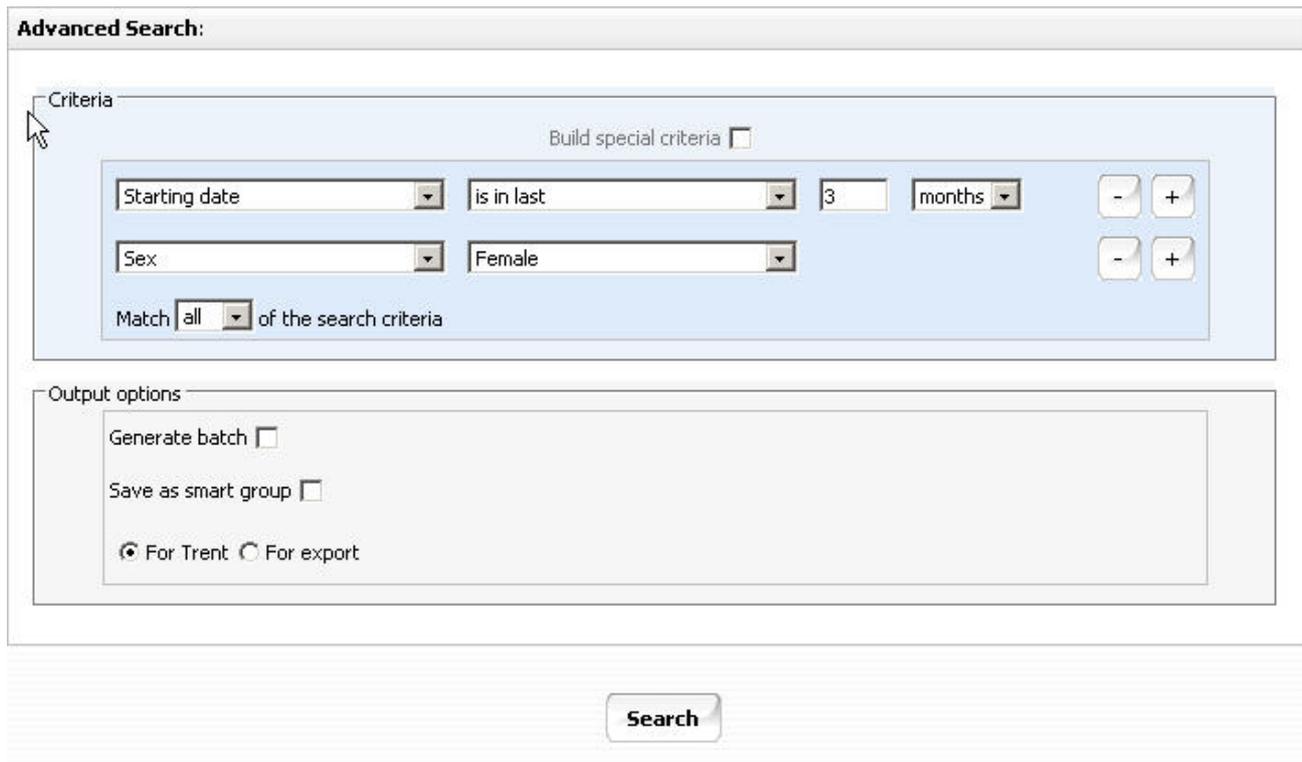
Rows can be removed from the condition by clicking the minus icon 

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

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

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.



The screenshot shows the 'Advanced Search' interface. It features a 'Criteria' section with a 'Build special criteria' checkbox. Below this, there are two rows of search criteria. The first row has 'Starting date' selected from a dropdown, followed by 'is in last', a text input containing '3', and a dropdown for 'months'. To the right of this row are minus and plus buttons. The second row has 'Sex' selected from a dropdown, followed by 'Female' selected from another dropdown, and minus and plus buttons to its right. Below the criteria section, there is a 'Match' dropdown set to 'all' and the text 'of the search criteria'. The 'Output options' section contains three checkboxes: 'Generate batch' (unchecked), 'Save as smart group' (unchecked), and 'For Trent' (checked) with 'For export' (unchecked) as an alternative. A 'Search' button is located at the bottom center of the interface.

Start your advanced search as before building the list of search criteria as shown above (this example is taken from the Position 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.

Advanced Search:

Criteria

Build special criteria

Starting date is in last 3 months - +

Sex Female - +

Match all of the search criteria

To add criteria block choose operator

Output options

Generate batch

Save as smart group

For Trent For export

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:

Advanced Search:

Criteria
Build special criteria

Starting date	is in last	3	months	-	+
Sex	Female			-	+

Match **all** of the search criteria

or

Organisation unit	contains	t	-	+
-------------------	----------	---	---	---

To add criteria block choose operator

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

Search

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

Advanced Search:

Criteria

Build special criteria

Starting date is in last 3 months

Sex Female

Match all of the search criteria

Organisation unit contains t

To add criteria block choose operator

Output options

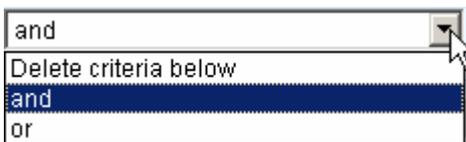
Generate batch

Save as smart group

For Trent For export

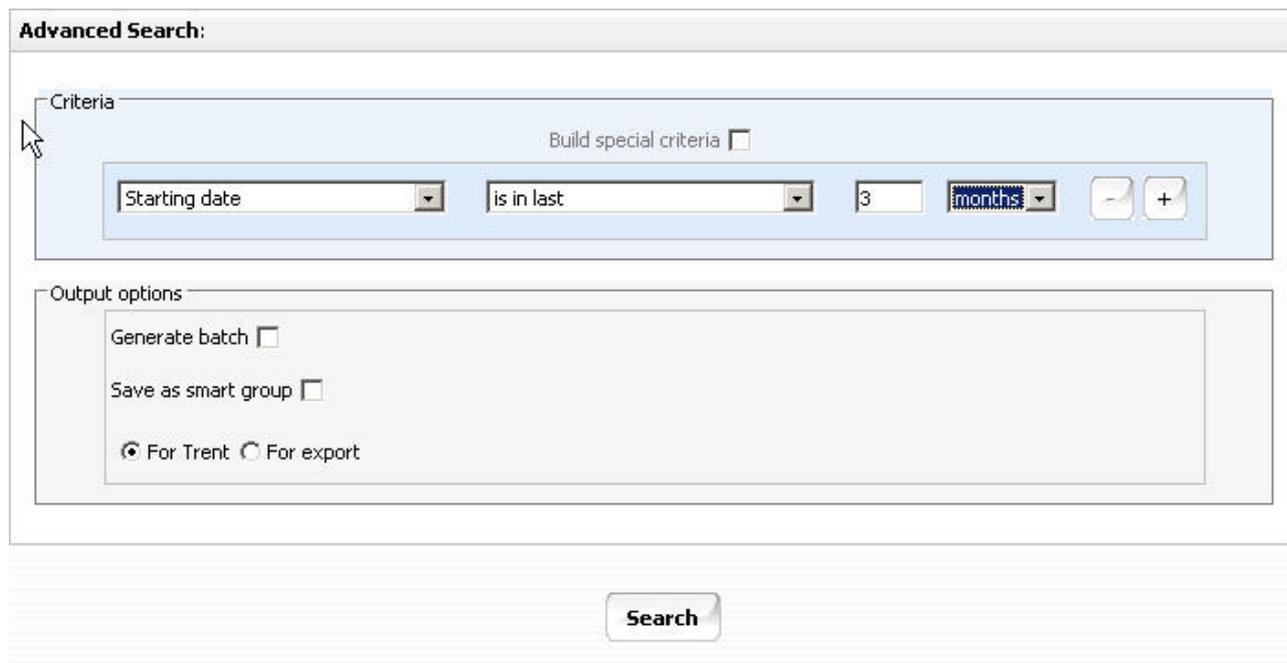
Search

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:



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:



Advanced Search:

Criteria

Build special criteria

Starting date is in last 3 months

Output options

Generate batch

Save as smart group

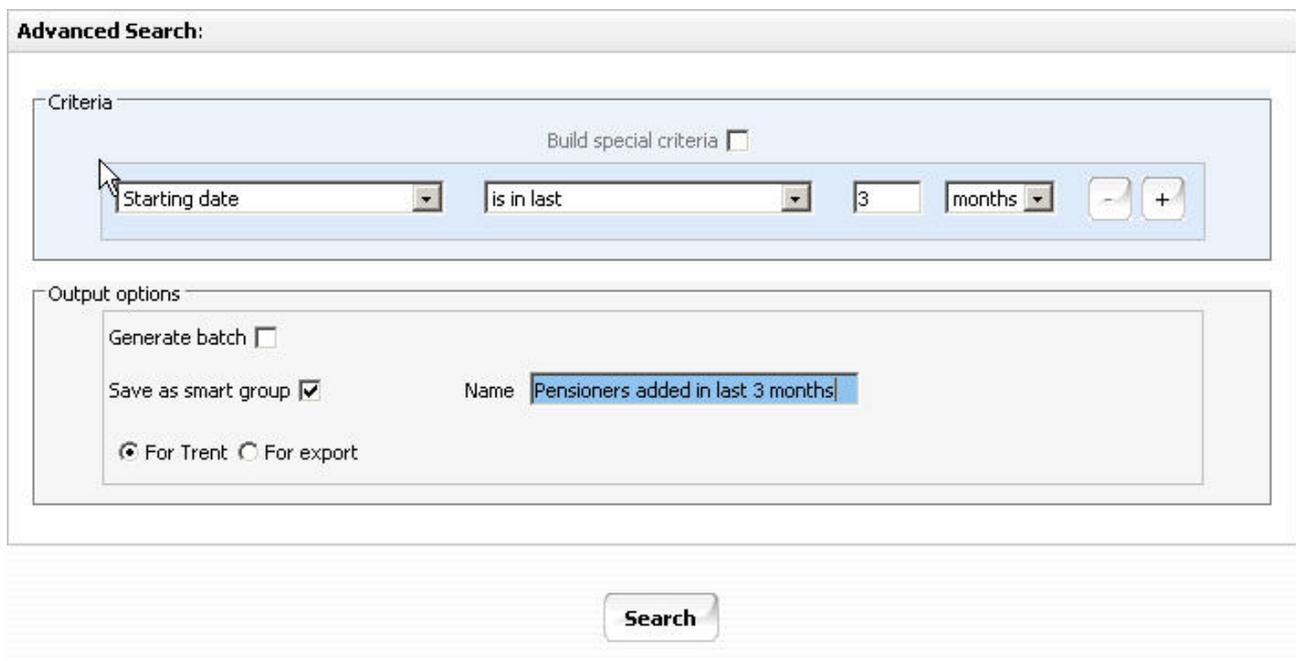
For Trent For export

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.

All advanced searches that act against a Unit, Post, Position, People or Costing will force the Effective date field, at the top of the Trent page to be enabled and active. Therefore all such searches will take this date into account when they are performed. You, therefore, need set this date before you start entering the Advanced search criteria.

5.3 Smart Groups

Within Search you can define and use Smart Groups. A Smart Group is the term used in Trent 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 pensioners whose starting date is in the last 3 months. 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.



The screenshot shows the 'Advanced Search' interface. It has two main sections: 'Criteria' and 'Output options'.
In the 'Criteria' section, there is a 'Build special criteria' checkbox. Below it, a search criterion is defined: 'Starting date' (selected from a dropdown), 'is in last' (selected from a dropdown), '3' (entered in a text box), and 'months' (selected from a dropdown). There are also minus and plus buttons to the right.
In the 'Output options' section, there is a 'Generate batch' checkbox (unchecked), a 'Save as smart group' checkbox (checked), and a 'Name' field containing the text 'Pensioners added in last 3 months'. At the bottom of this section, there are two radio buttons: 'For Trent' (selected) and 'For export' (unchecked).
A 'Search' button is located at the bottom center of the form.

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.

Search Smart groups Advanced

All

Smart group name	Output	Type	Access	Created by	Date created
Pensioners added in last 3 months	Trent	Dynamic	Public	NW123	15/03/2007
T Pensioners	Trent	Dynamic	Public	RM474	23/02/2007

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.

Search Smart groups Advanced

Surname Results 16 People

Select all Edit this group

Name	Unit	Job title	Sex	Date of birth	Social security no.
BOWEN, T	P-Pensioners	BOWEN, T. A.	Male	27/06/1942	
DOLIDZE, L	P-Pensioners	DOLIDZE, L.	Female	01/09/1946	
FORBES, V	P-Pensioners	FORBES, V. R.	Female	29/04/1944	
FREE, M	P-Pensioners	FREE, M. J.	Male	12/03/1948	
GURNEY, W	P-Pensioners	GURNEY, W. G.	Male	29/12/1943	
HAKE, F	P-Pensioners	HAKE, F. M. L.	Female	31/12/1946	
HOUGHTON, C	P-Pensioners	HOUGHTON, C. A.	Female	04/12/1946	
JENNINGS, B	P-Pensioners	JENNINGS, B. K.	Male	19/11/1928	
MILNE, J	P-Pensioners	MILNE, J. A.	Female	22/12/1946	
NUNES, J	P-Pensioners	NUNES, J. A.	Male	19/03/1949	

Smart group details: Pensioners added in last 3 months

Smart group name

Date generated 15/03/2007

Type Dynamic Fixed

Access Public Private

Criteria

Build special criteria

Output options

Generate batch

For Trent For export

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

A dynamic Smart group is maintained by Trent and contains the records that meet the search criteria each time the smart group is accessed. When people no longer satisfy any of the included criteria, 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. Records 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 Export radio button. The results can be sent to:

- HTML as Data
- HTML as a Report
- MS Word as Data
- MS Word as a Report
- MS Excel as Data
- CSV

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

Organisation unit
Job title
Personal reference
Leaver
Position reference number
Position occupancy reference

Surname
Forename
Sex
Date of birth
Social security number

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.

-
-  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  button which is displayed. The button and primary field will change to red. If required highlight the second sort field and then click the  button. The button and secondary grouping chosen will change to blue.

6 Explorers

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

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 Trent 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.



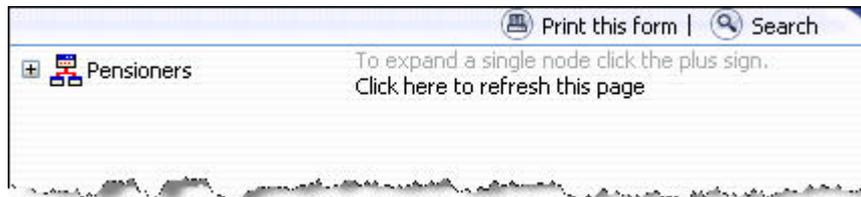
It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain elements search for the unit, post or position and click the Mini explorer link in the action pane.

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. Trent 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 . Trent displays all the matching items in the search pane.
5. Select the required item from the search result. Trent expands the Organisation explorer to reveal the location of the selected item.

6.2 Organisation Structure

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

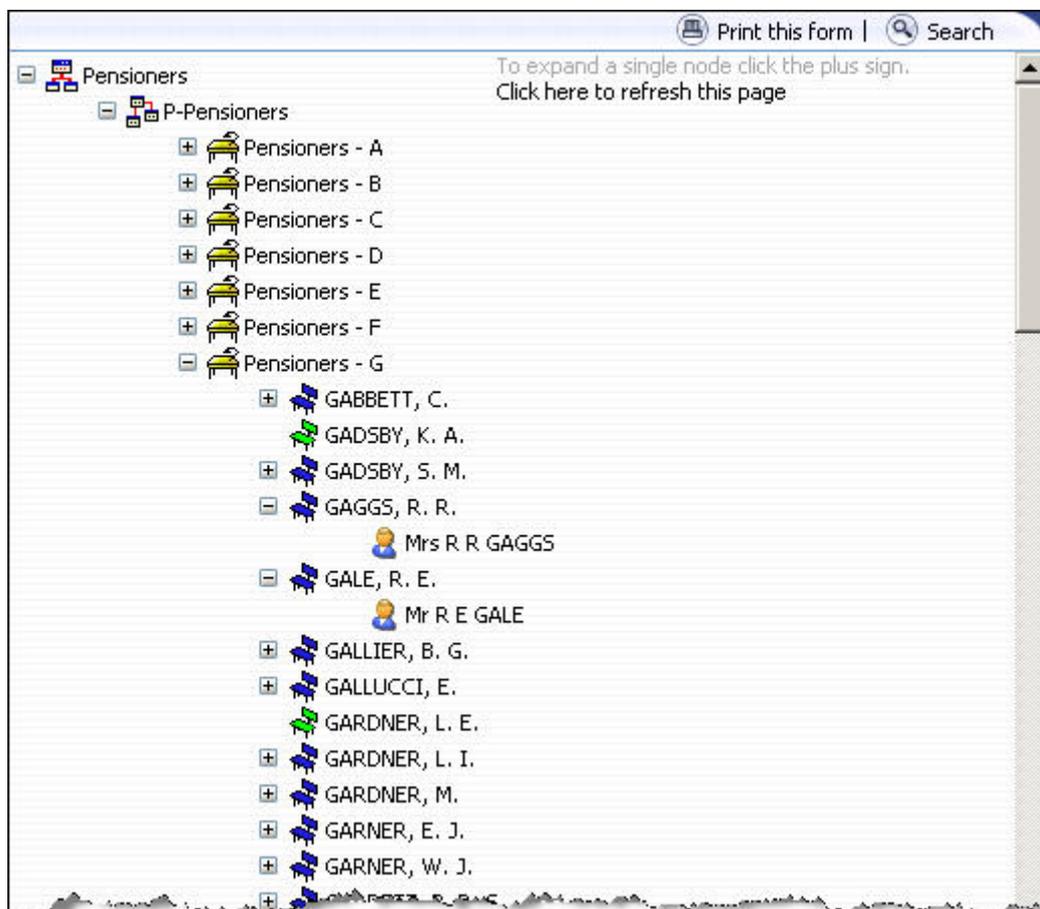
Organisation Structure



The organisation structure is the set of interconnected parts that represent the University of Cambridge as a whole.

We have 2 separate organisations: University of Cambridge and Pensioners.

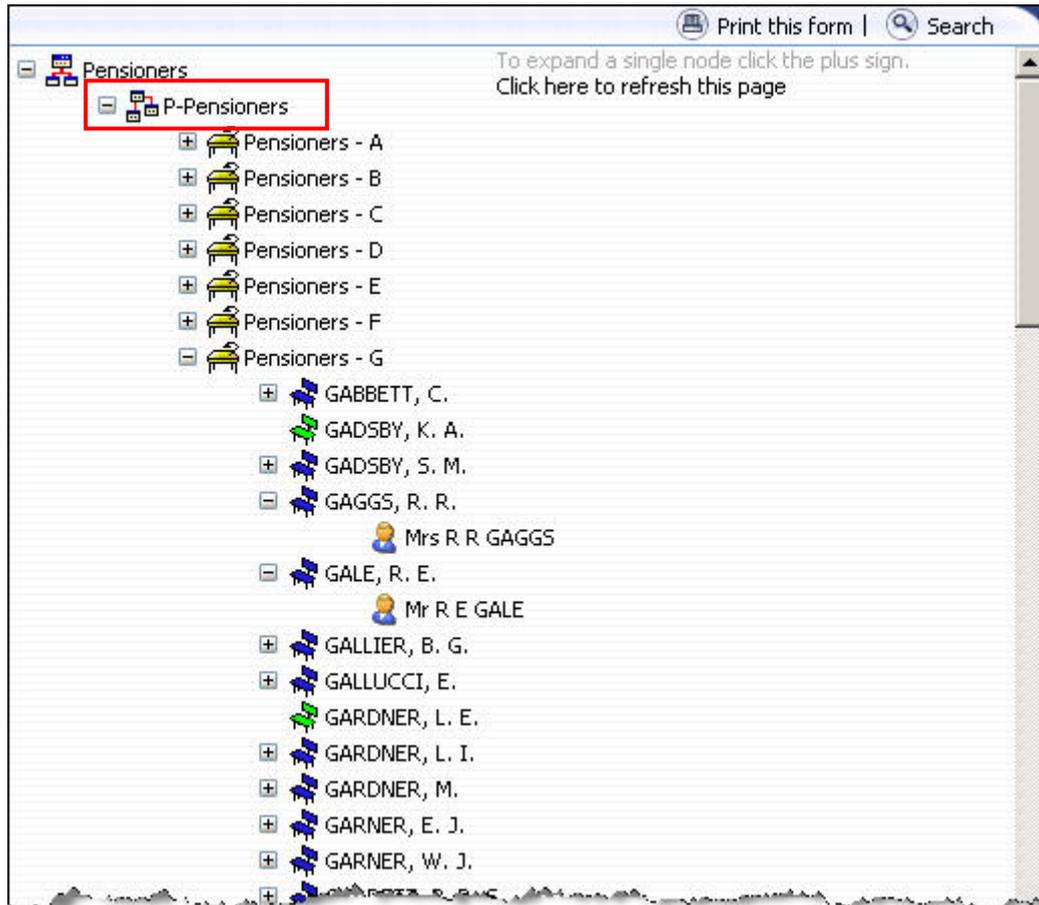
Most departmental users will only see the University of Cambridge organisation.



Unit



A unit is an organisation structure component that is made up of subordinate components including other units and posts. For example P-Pensioners and T-Pensioners are a classed as units and contain the relevant people.



When viewing the structure in the organisation explorer, the appearance of a plus icon   next to any element indicates hidden items below the level displayed.

Clicking the plus icon will expand the diagram to display the subordinate components. When the selected node is fully expanded, the plus icon  changes to a minus icon .

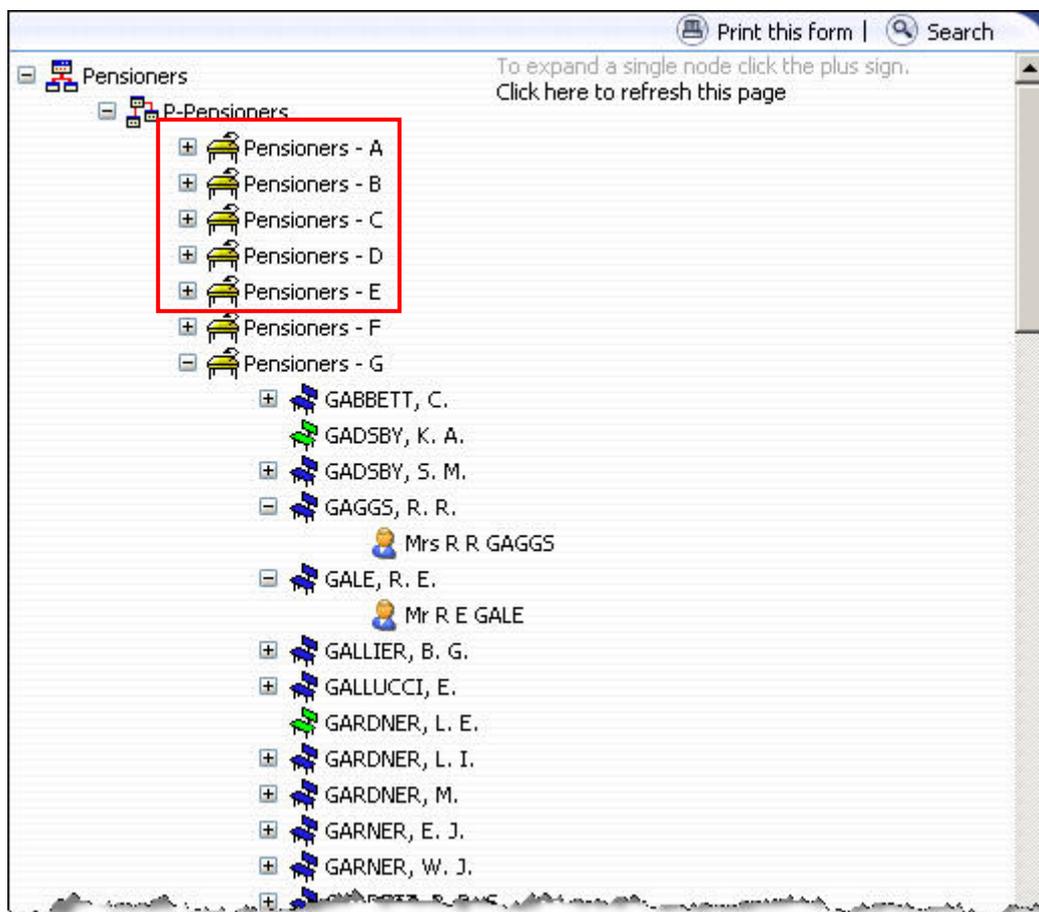
Clicking the minus  icon condenses the node again.

Post



Within Cambridge we have allocated different pensioner groups to posts. A Post is an intermediate component in the organisation structure. A post always belongs to a superior organisation unit, e.g. P-Pensioner or T-Pensioner. If a person is to occupy a post it is always by means of an intermediate 'position'.

Within the Pensioners organisation we have split the pensioners into post groups according to the initial letter of their surname.



Position



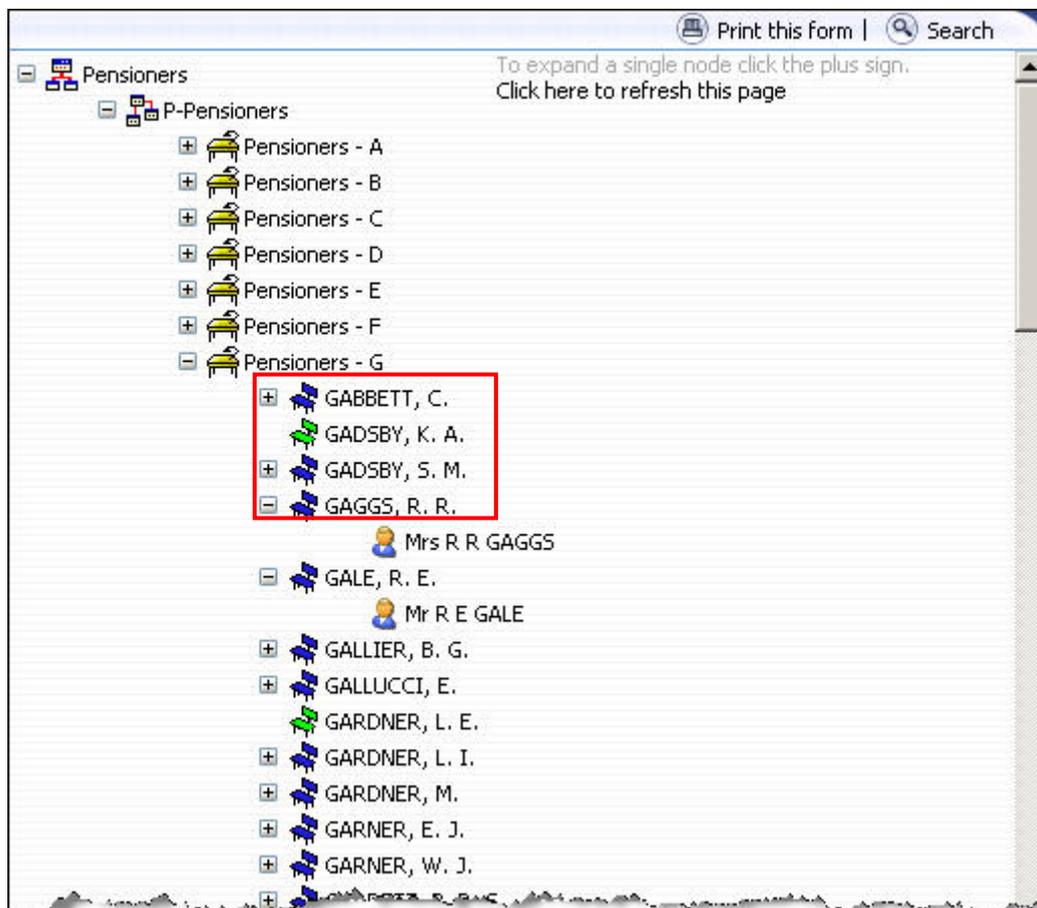
A position is a location in the Organisation in which a person can be placed. In the Pensioners organisation, a position will be created for each pensioner using their name as the position title.



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. This is not relevant for the Pensioners organisation.

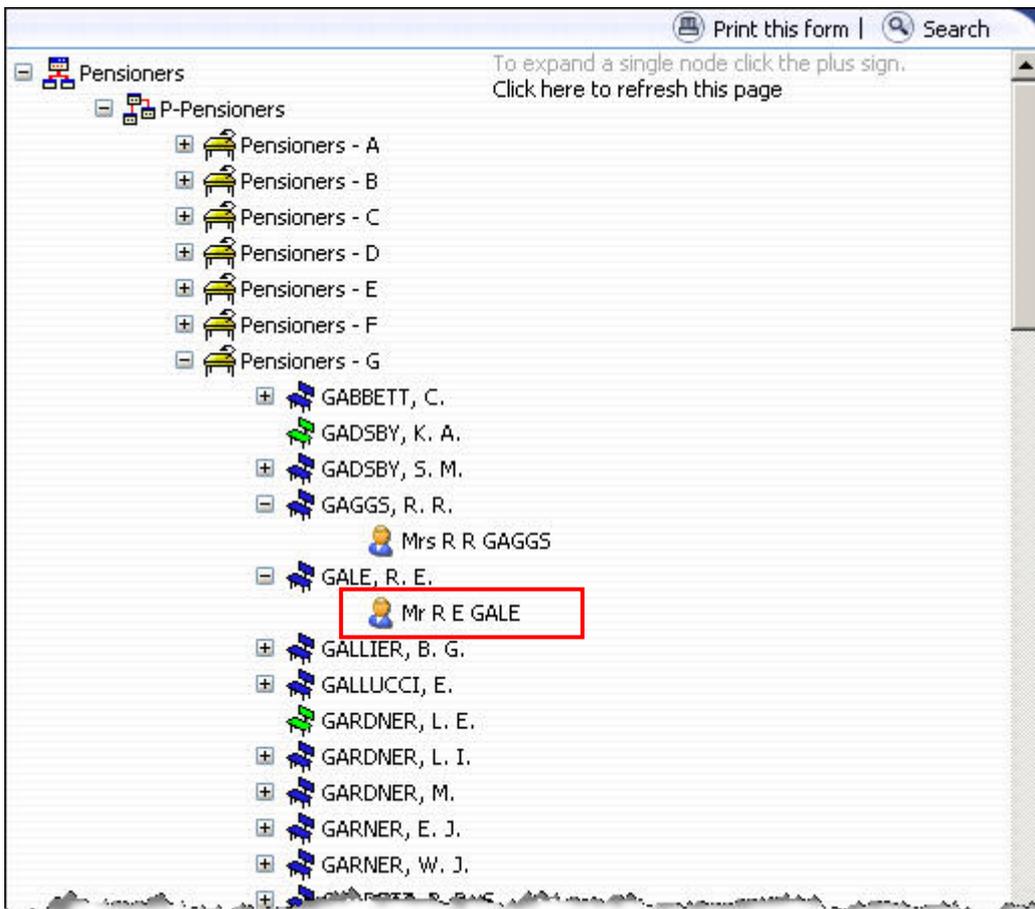


People



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

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

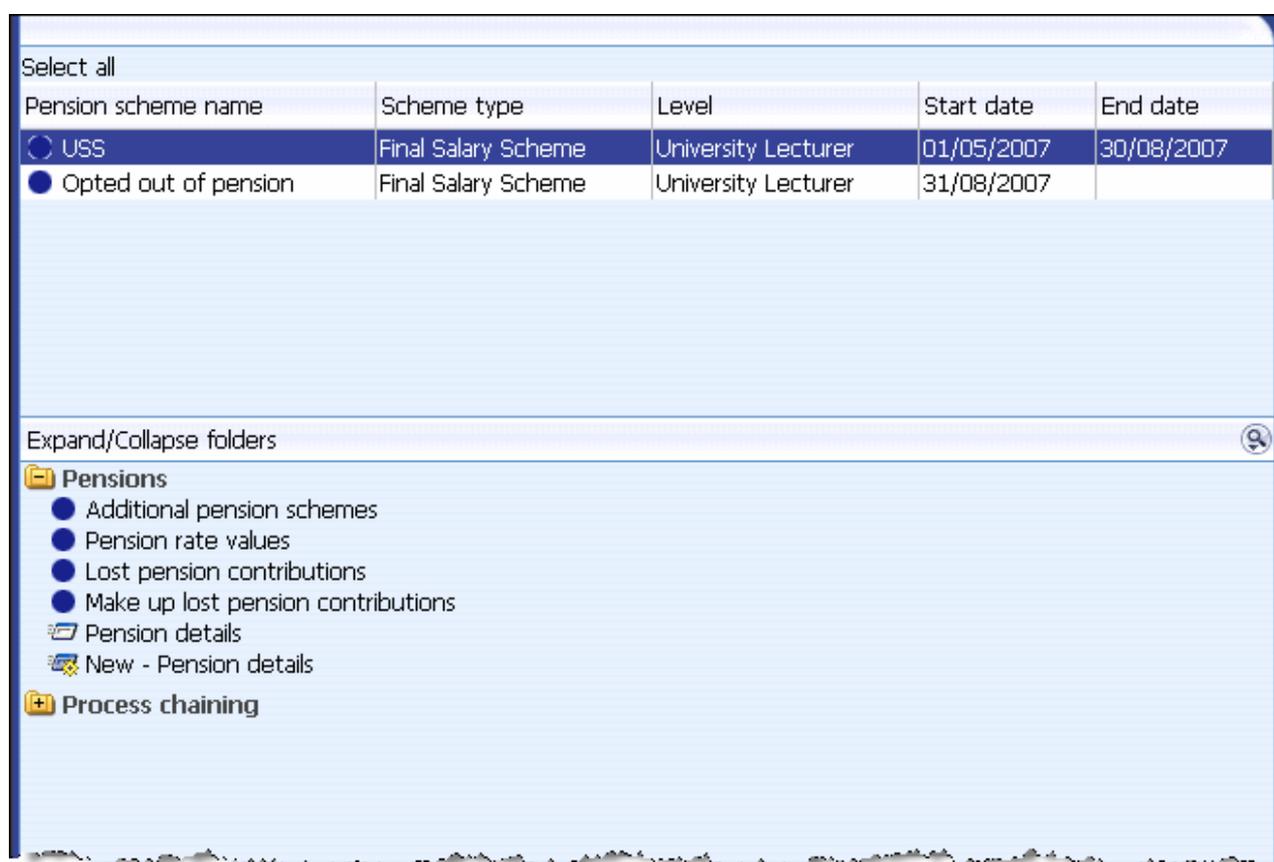


7 Viewing Pension details of current employees

7.1 Identifying which Pension scheme an employee is in

Eligibility of a person to be included within one of the University's final salary scheme is dictated by their position. Within CHRIS this is indicated by a Term and condition called 'Final Salary Scheme' that that is attached to their position.

Navigate: **University Organisation > People (find person) > Payroll > Pensions**



Select all

Pension scheme name	Scheme type	Level	Start date	End date
<input type="radio"/> USS	Final Salary Scheme	University Lecturer	01/05/2007	30/08/2007
<input checked="" type="radio"/> Opted out of pension	Final Salary Scheme	University Lecturer	31/08/2007	

Expand/Collapse folders 

-  **Pensions**
 - Additional pension schemes
 - Pension rate values
 - Lost pension contributions
 - Make up lost pension contributions
 -  Pension details
 -  New - Pension details
-  **Process chaining**

7.2 AVCs

If someone has AVCs attached then this will be shown as an ‘Additional Pension scheme’ on Trent. Find the person and highlight their pension as shown above. Then select ‘Additional Pension schemes’.

Navigate: **University Organisation > People (find person) > Payroll > Pensions > Additional Pension schemes**

Select all			
Pension scheme name	Level	Start date	End date
<input checked="" type="radio"/> USS DA AVC (%)	Professor of Classical English	01/06/2007	

7.3 Pensionable posts

An alternative method to view someone’s pension details is to look at their terms and conditions. This is a particularly good way of checking whether a particular position is pensionable or not .

Navigate: **University Organisation > People (find person) > Employment > Positions > Terms & conditions > Terms & Conditions**

Select all				
Terms & Conditions item	Choice	Package	Start date	End date
<input type="checkbox"/> OSP - Sickness	Occupational Sickness Scheme (Officers)		01/03/2007	
<input type="checkbox"/> Faculty Membership	Faculty of Education		01/03/2007	
<input type="checkbox"/> Competent Authority	General Board		01/03/2007	
<input type="checkbox"/> OMP	Occupational Maternity Scheme		01/03/2007	
<input checked="" type="checkbox"/> Final Salary Scheme	USS		01/03/2007	

The green ‘pipe’ indicates that the final salary scheme has been inherited down to their position from their post. If you want to see where it has inherited from then you can review this by looking ensuring that you have the ‘Final Salary Scheme’ highlighted and selecting ‘Inheritance chart’ option.

Level	Final Salary Scheme
University of Cambridge	
Council & General Board	
General Board	
School of Arts and Humanities	
Faculty of Modern and Medieval Languages	
Department of French	
Academic Posts	USS
Senior Lecturers	
University Senior Lecturer	<input checked="" type="checkbox"/> USS
University Senior Lecturer	USS

7.3.1 Opt Outs

If an individual decides to opt out of one of the salary schemes, then Payroll will action this upon receiving instructions from the Pension Team.

Terms & Conditions item	Choice	Package	Start date	End date
OSP - Sickness	Occupational Sickness Scheme (Officers)		01/05/2007	
Faculty Membership	Faculty of Education		01/05/2007	
Competent Authority	General Board		01/05/2007	
OMP	Occupational Maternity Scheme		01/05/2007	
<input checked="" type="checkbox"/> Final Salary Scheme	Opted out of pension		01/05/2007	

This way you can see that the original position was pensionable but that the current job holder has decided to opt out.

7.4 Key Dates

The system records all on the 'Key Dates' page the following information for an individual:

- Date of birth
- Expected retirement date
- Reckonable service date

Navigate: **University Organisation > People (find person) > Key Dates**

Key dates: Dr Kevin Henry	Name: Dr Kevin Henry	Job title: Professor of Classical English
	Social security number: AB265397C	Pay ref: 30000061
		Pers ref: 30000061
Personal		
Date of birth	<input type="text" value="10/06/1965"/>	
Age	42 year(s) 0 month(s)	
Date verified	<input type="text"/>	
Expected retirement date		
Basis	<input type="text" value="Date"/>	
Age (years)	65	
Age (months)	3	
Date	<input type="text" value="30/09/2030"/>	
Organisation		
Start date	<input type="text" value="01/03/2007"/>	
Length of service	0 year(s) 3 month(s)	
Leaving date	<input type="text"/>	
Reckonable service date	<input type="text"/>	
Length of reckonable service	<input type="text"/>	
Last working day	<input type="text"/>	
Re-employable	No	
<input type="button" value="Save"/>		

7.5 Identifying those that have retired

For an individual

The Leavers Information page will indicate that someone has retired and the date that this took effect.

Navigate: **University Organisation > People (find person) > Employment > Leaver Information**

Start date	Leaving date	Reason for leaving	Re-employable	Exit interview complete?	Last working day	Last
01/03/2007	30/06/2007	Retirement	No	No		

For a group

There is a standard Trent report entitled 'Leavers' that can be run for either the whole University or just a department, for whichever time period that you choose.

Navigate: **University Organisation > Management Information > People Reports**

Report name	Status	Last run date	Last run time
Age Analysis By Organisation Unit	Complete	08/06/2007	16:05
Age Analysis By Sex			
Disability Analysis By Organisation Unit	Complete	08/06/2007	16:28
Employee Information Check			
Ethnic Origin Analysis			
H & S Event Renewals Pending			
Leavers	Complete	11/06/2007	12:32
Length Of Service By Organisation Unit			
Length Of Service By Sex			

Leavers:

Organisation start point:

Start date:

End date:

Organisation view:

Show details:

Full path display:

Output type:

Report run comments:

The report gives the name of the individual and their reason for leaving but doesn't indicate which if any pension scheme they were in.

Trent							University of Cambridge
Organisation Leavers							
Start Date: 01/06/2007		Organisation Start Point: Department of Training			Organisation View: Full		
End Date: 30/06/2007					Path Display: Partial		
Organisation Unit	Job Title	Leaving Date	Last Working Date	Reason for Leaving	Exit I-view Done	Length of Service	New Employer
Department of Training							
Henry Kevin	Professor of Classical English	30/06/2007		Retirement	No	0 yrs 3mths	
Li James	Professor of Classical Music	30/06/2007		Redundancy	No	0 yrs 3mths	
Lin Huai-Xue	Junior Research Lab	03/06/2007		Not known	No	12 yrs 5mths	
Parry Claire	Junior Research Lab	01/06/2007		Resignation	No	0 yrs 1mths	
Overall Totals 4							

7.6 Pension Reports & Interfaces

A number of bespoke reports and interfaces for the Pension Team are currently being worked on. Initially during parallel running phase of the project the Pension Team will continue to receive exactly the same reports as they do so currently. Gradually new reports will be phased in over this period. The intention is to give the Pension team copies of both the new and the existing reports to allow comparison's to be made.

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 4 th 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	Cancel 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)