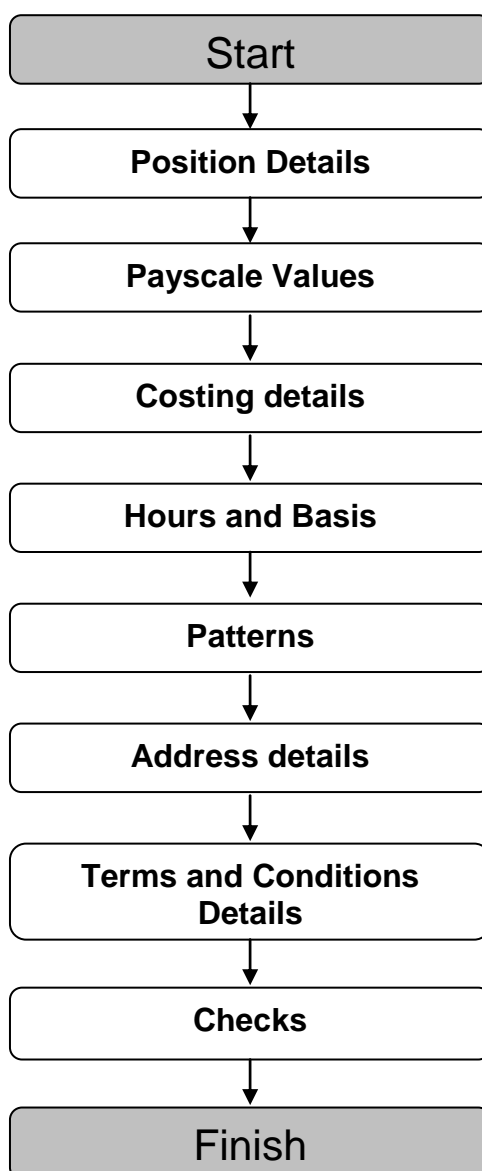




## 8 Reviewing Position Details

### 8.1 Process Overview

The Review Position process chain encompasses many of the Trent forms that allow you to add key data in to the database. The following diagram shows the forms encountered in the chain.



Attaching a person to a position will change the Position into an occupied position and its icon will change from green  to blue 

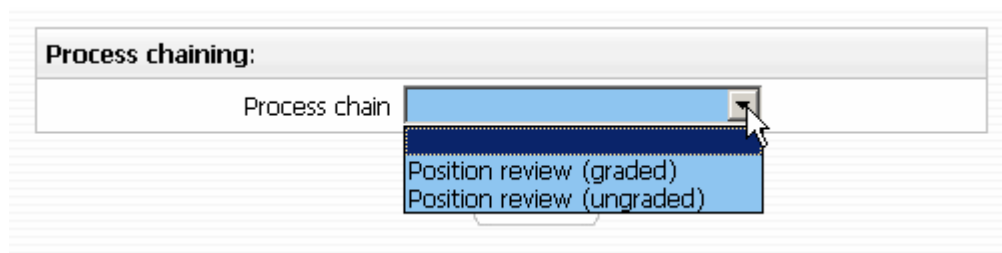
## 8.2 Starting the Process

**Navigate: Organisation > Positions > Process Chaining > Process Chaining**

1. Select the University of Cambridge organisation
2. Select the Positions menu item from the Action Pane. Use the search options to locate the position to be reviewed. The position will be displayed as a green (vacant) chair.
3. Select the Process Chaining menu from the Action pane



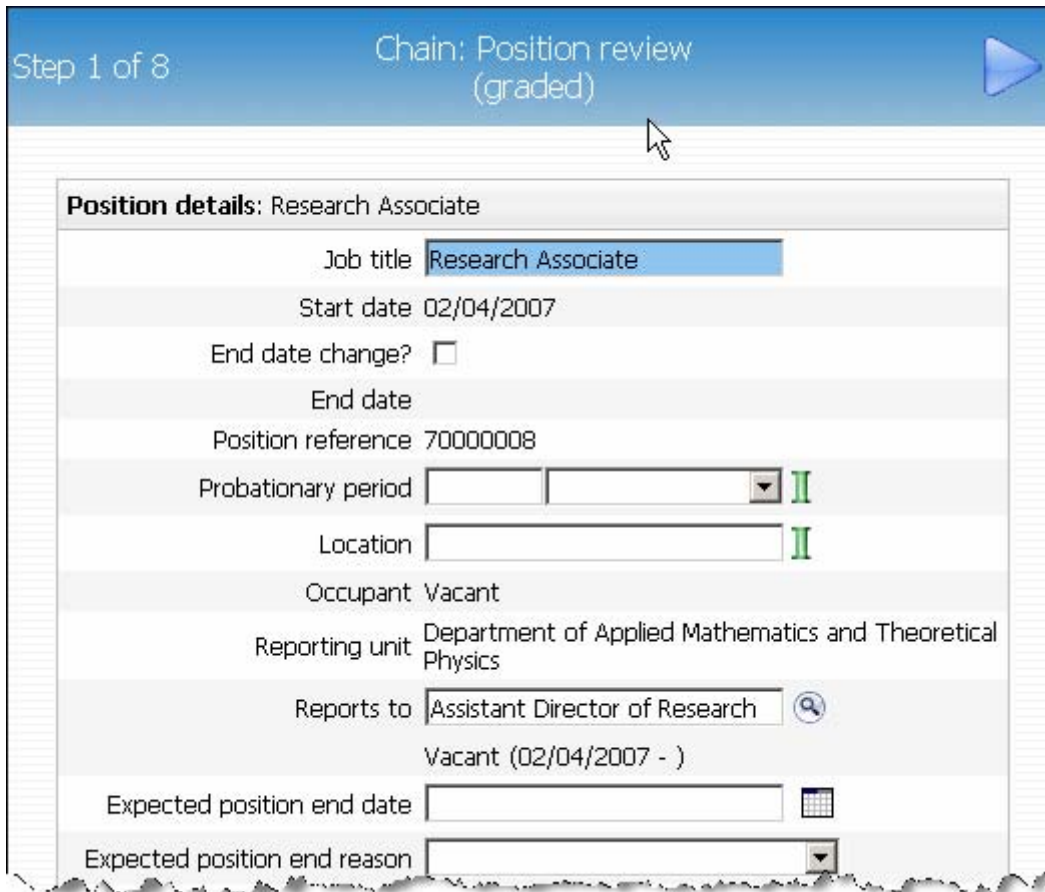
4. Select the Process Chaining option and type in the required date in the effective date field.
5. The resulting form will allow you to select the required Process Chain from the picklist available.



6. Select Position review (graded) or position review (ungraded) as appropriate.

The following screen prints show the Position Review (graded), the screens are the same for both chains with the exception of step 2.

- Once the required process is selected, click on the Start button to commence the process. The first step will then be presented (Position Details).



Step 1 of 8 Chain: Position review (graded)

**Position details:** Research Associate

Job title

Start date 02/04/2007

End date change?

End date

Position reference 70000008

Probationary period

Location

Occupant Vacant

Reporting unit Department of Applied Mathematics and Theoretical Physics

Reports to

Vacant (02/04/2007 - )

Expected position end date

Expected position end reason

- Enter the Probation period for the position.
- Check that the Reporting Manager information is correct.
- Check that the Position Status is set to Permission to Fill Granted, this will authorise automatically for new positions.



**Position status**

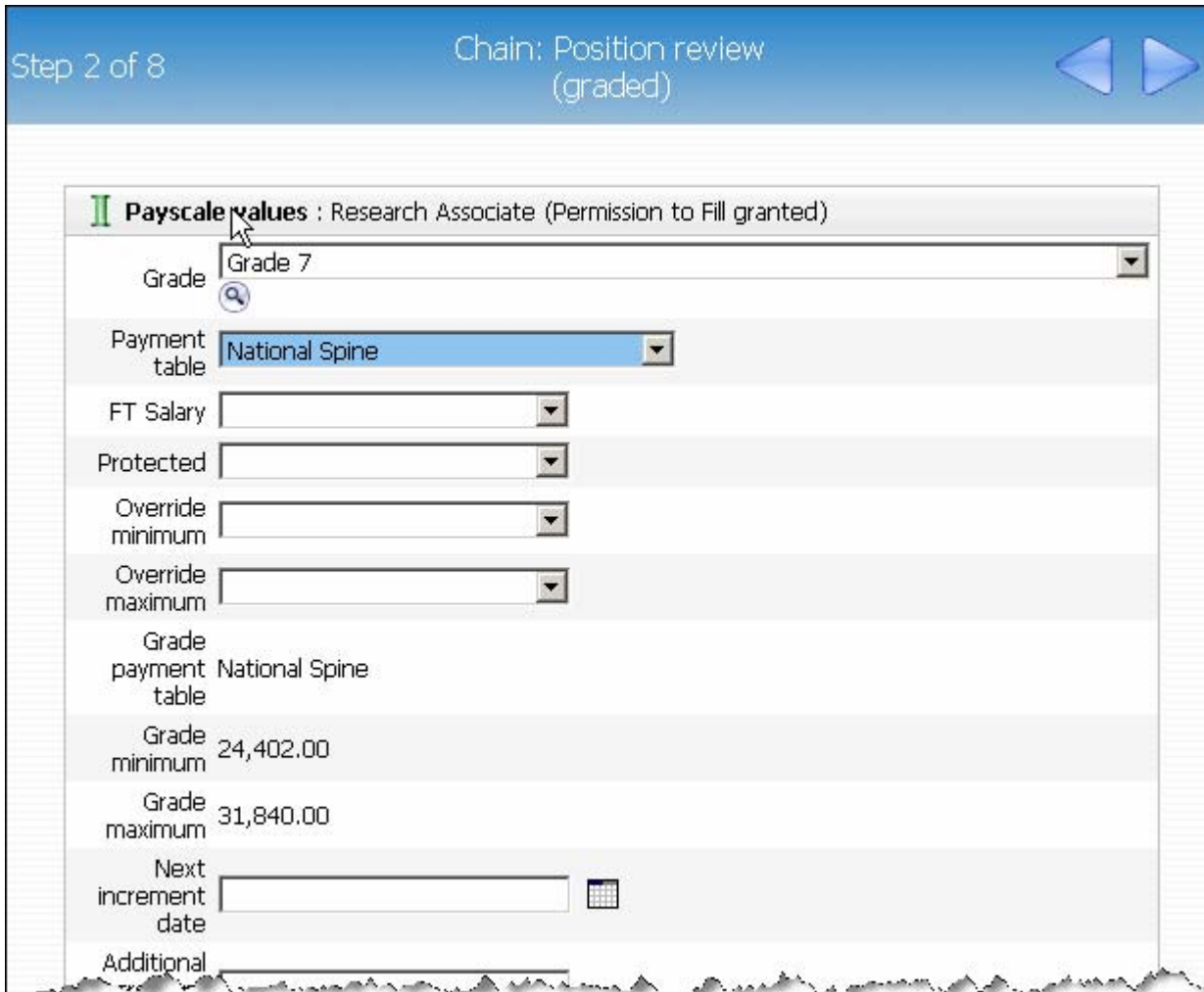
Position status

Effective from

- Click the  button. The record will be saved and the new position details will be displayed in the object pane.

### 8.3 Payscale Values

1. Click on the Next Step button, this will present you with the form used to check/enter the salary information.



Step 2 of 8 Chain: Position review (graded)

**II Payscale values** : Research Associate (Permission to Fill granted)

Grade

Payment table

FT Salary

Protected


Override minimum

Override maximum

Grade payment table National Spine

Grade minimum 24,402.00

Grade maximum 31,840.00

Next increment date  

Additional


2. Ensure the Grade and payment table are correct, this information will be inherited from the Post. Select the appropriate point for the new position from the FT Salary drop down box, and enter the next increment date. (You will now need to do this for Assistant staff too!)



Where the salary is within the normal range for the grade the override maximum should be set to the grade maximum and the FT Salary point will be less than or equal to the grade maximum.

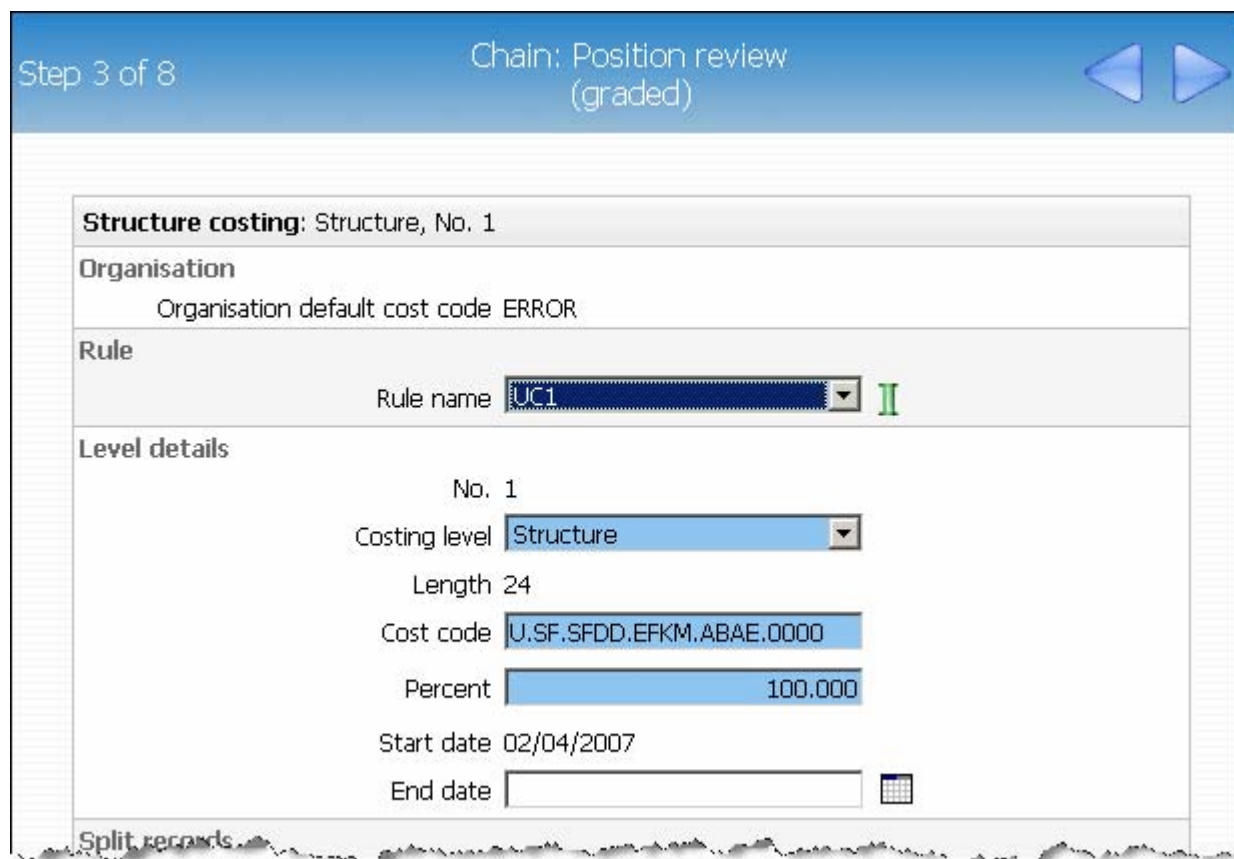
Where the salary is on a contribution point the FT Salary point should be equal to the override maximum.

Where a personal bar is set the override maximum and the FT Salary point should be less than the grade maximum.

3. Click the  button

## 8.4 Costing Details

1. Click on the Next Step button, this will present you with the form used to check/enter the costing information.



Step 3 of 8 Chain: Position review (graded)

**Structure costing:** Structure, No. 1

**Organisation**  
Organisation default cost code ERROR

**Rule**  
Rule name UCI


**Level details**  
No. 1  
Costing level Structure  
Length 24  
Cost code U.SF.SFDD.EFKM.ABAE.0000  
Percent 100.000  
Start date 02/04/2007  
End date

Split records

2. Again, this information will be inherited from the Post and should not require changing unless the New Appointment Request Form is accompanied by an Amendment of Post or Appointment form.  
(N.B. Vacant posts are not being migrated with any costing information)

## 8.5 Hours and Basis Details

1. Click on the Next Step button, this will present you with the form used to view/enter the Hours and Basis information.

Step 4 of 8
Chain: Position review (graded) 

**Hours and basis** : Research Associate (Permission to Fill granted)

Contractual Hours	37.00	II
FTE hours	37.00	II
Post budgeted hours		II
Annual weeks worked	52.25	II
Category	Researcher	II
Basis	Unestablished	II
Type	Non Clinical Researcher	II
Change reason		

**FTE details**

Override FTE calculation No override


FTE value 1.00

Save

2. These details should be inherited from the Post, but ensure the all the relevant data is entered (Contractual Hours, FTE Hours, Category, etc)
3. Click the Save button

## 8.6 Working Pattern Details

1. Click on the Next Step button, this will present you with the form used to view/enter working pattern information.



Step 5 of 8 Chain: Position review (graded)

**Pattern details: Working Pattern**

Type Working Pattern


Pattern Mon-Fri default

Start day Week 1 / Day 1

Start date 02/04/2007

End date

Save Delete

2. The information viewed will be that inherited from the Post. If the working pattern is different at position level, details can be amended here.
3. Click the  button





## 8.7 Address details

1. Click on the Next Step button, this will present you with the address details

Step 6 of 8
Chain: Position review  
(graded)
◀ ▶

**Address details: UMS**

Address type	<input type="text" value="UMS"/>
House Name	<input type="text" value="CMS"/>
Number/Street	<input type="text" value="Wilberforce Road"/>
Local Area	<input type="text"/>
POSTTOWN	<input type="text" value="Cambridge"/>
COUNTRY	<input type="text"/>
POSTCODE	<input type="text" value="CB3 0WA"/> 
Country	<input type="text" value="United Kingdom"/>
Start date	<input type="text" value="02/04/2007"/>
End date	<input type="text"/> 

2. This address will be the main institutional address and can be changed where the employee will work at a location different to this. The source of information is the Place of Work section of the New Appointment Request Form.
3. Click the  button

## 8.8 Terms and Conditions Details

1. Click on the Next Step button, this will present you with the inherited Terms and Conditions items.

Terms & Conditions item	Choice	Pack
OSP - Sickness	Occupational Sickness Scheme	
Faculty Membership	No Faculty	
Competent Authority	Council	
OMP	Occupational Maternity Scheme	
Final Salary Scheme	USS	

Expand/Collapse folders

- [-] Terms & Conditions
  - Authorisation history
  - T&C details
  - [+] New - T&C details
    - Inheritance chart
    - History
- [+] Attachments
- [+] Process chaining

2. You will need to click on a Terms and Condition entry, (which will be inherited from the relevant Post), to view the details of step 7 of the screen chain

Step 7 of 8
Chain: Position review (graded) < >

**Terms & conditions** : Final Salary Scheme (USS)

T&C Item: Final Salary Scheme

Choice: USS

Notes

Start date: 02/04/2007

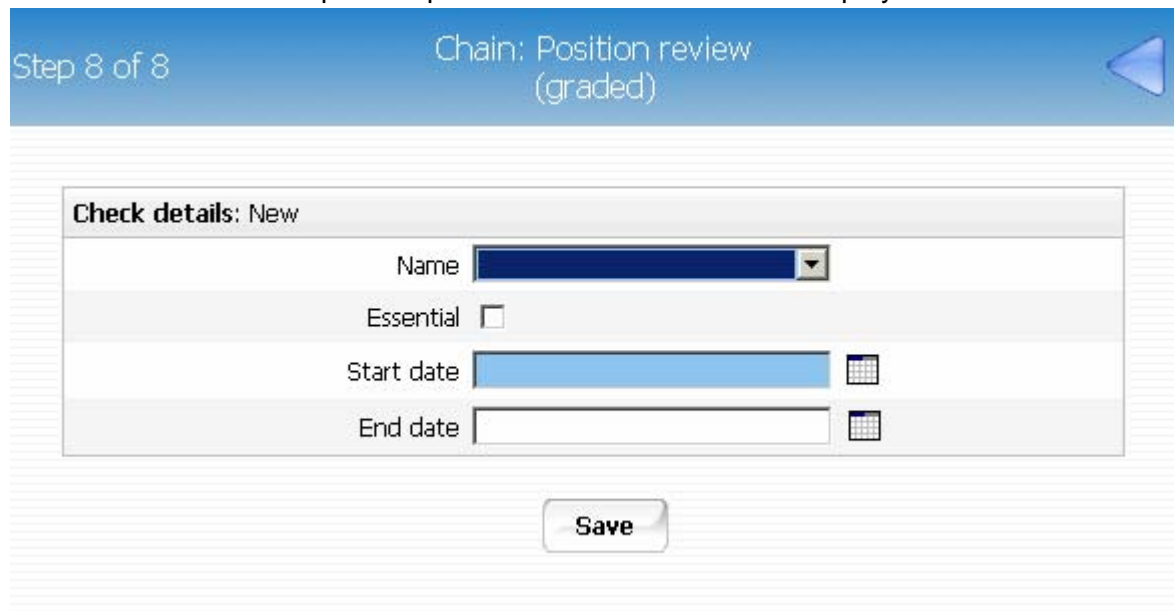
End date:

Save
Delete

3. Click the  button

## 8.9 Check details

1. The final step of the position review screen chain displays check details.





Step 8 of 8 Chain: Position review (graded)

**Check details: New**

Name

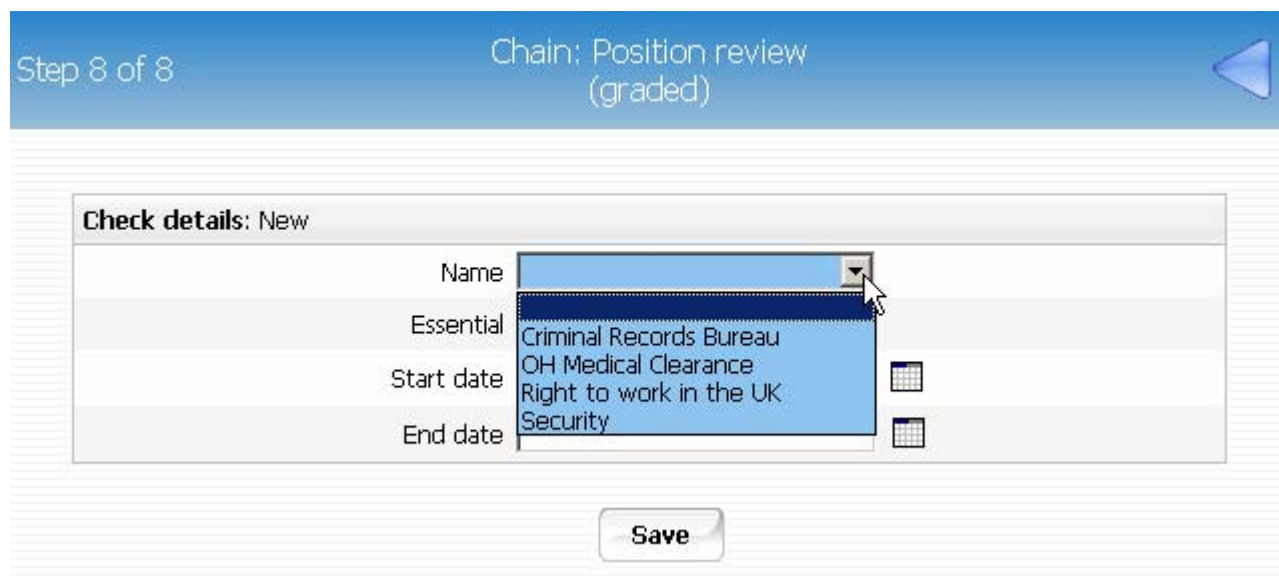
Essential

Start date  

End date  

**Save**

2. If the position requires a check (in addition to the Right to Work check that will be a requirement for all) to be carried out click the drop down arrow to display the list.





Step 8 of 8 Chain: Position review (graded)

**Check details: New**

Name

Essential

Start date  

End date  

**Save**

3. Select the required check. Check the essential box and add the start date
4. Click the **Save** button

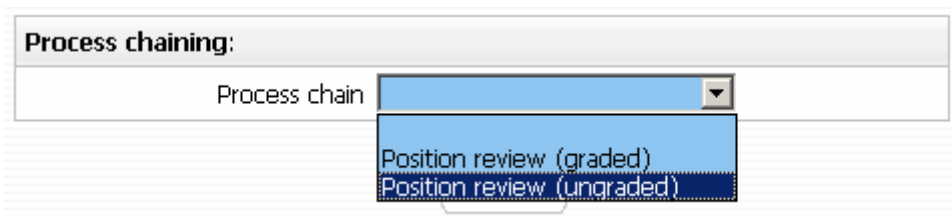
Use the navigation trail to exit from the screen chain once complete.

## 8.10 Position Review (Ungraded)

The process for reviewing details of an ungraded position is similar to that used for the graded position review, with the following differences.

### 8.10.1 Starting the Process

The process can be found in the same place, but you need to select the Position Review (ungraded) process.



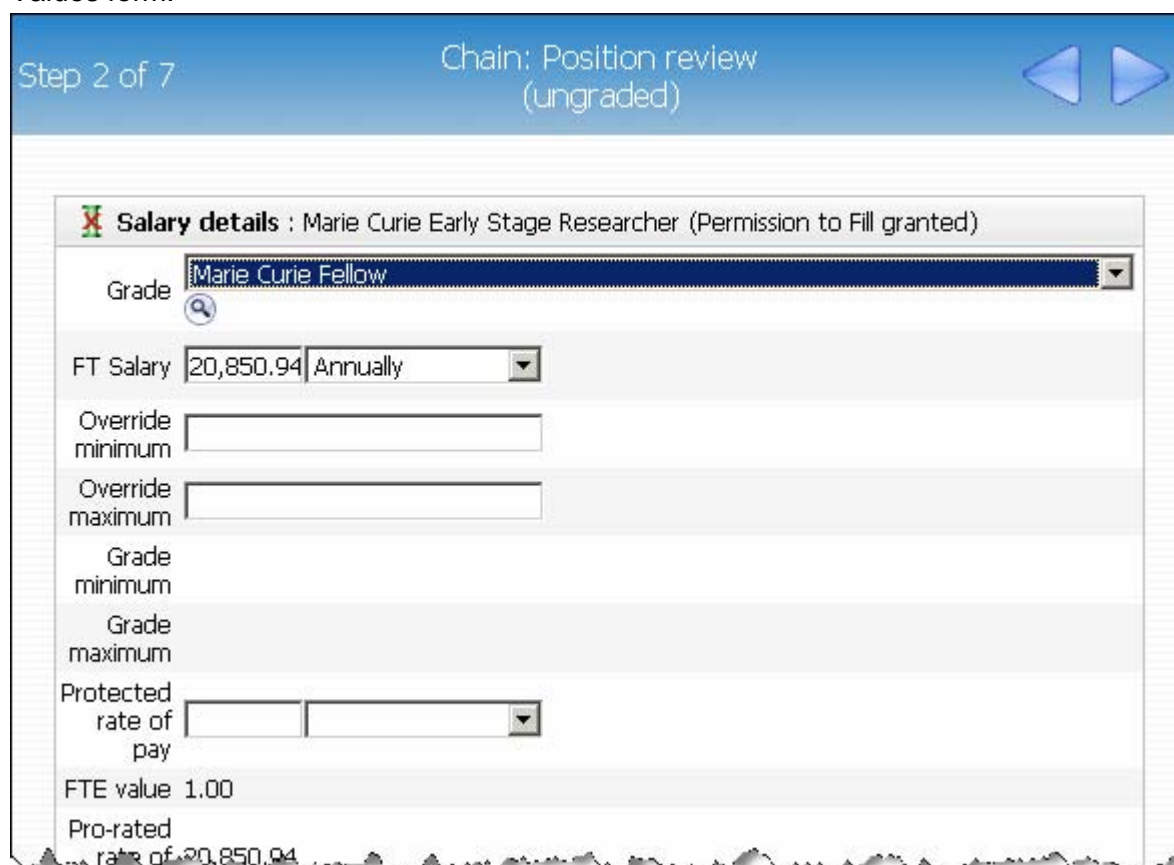
Process chaining:

Process chain

- Position review (graded)
- Position review (ungraded)

### 8.10.2 Salary Details

The form used to enter salary details (step 2) is Salary Details and not the Payscale Values form.



Step 2 of 7 Chain: Position review (ungraded)

**Salary details** : Marie Curie Early Stage Researcher (Permission to Fill granted)

Grade

FT Salary

Override minimum

Override maximum

Grade minimum

Grade maximum

Protected rate of pay

FTE value 1.00

Pro-rated rate of 20,850.94

Enter the salary for the position and the frequency from the drop down box

Click the  button.