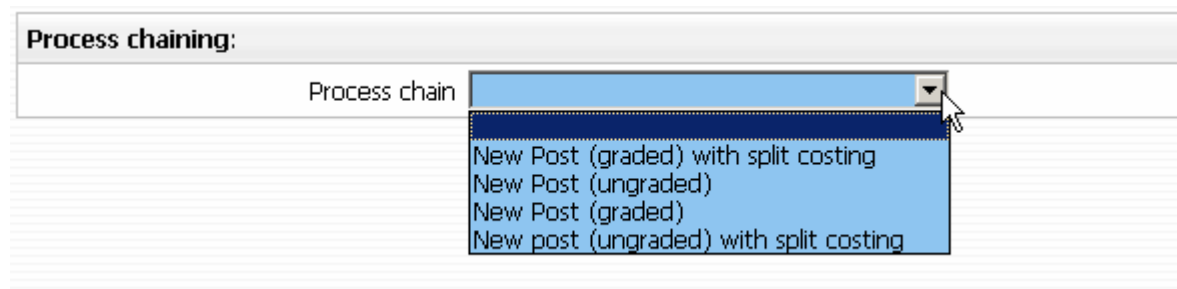


4 Additional Post Details

Once the new post has been created you will need to add further details. There are four Process Chains that are used for this.

- New Post (Graded)
- New Post (Ungraded)
- New Post (graded) with split costing
- New Post (ungraded) with split costing

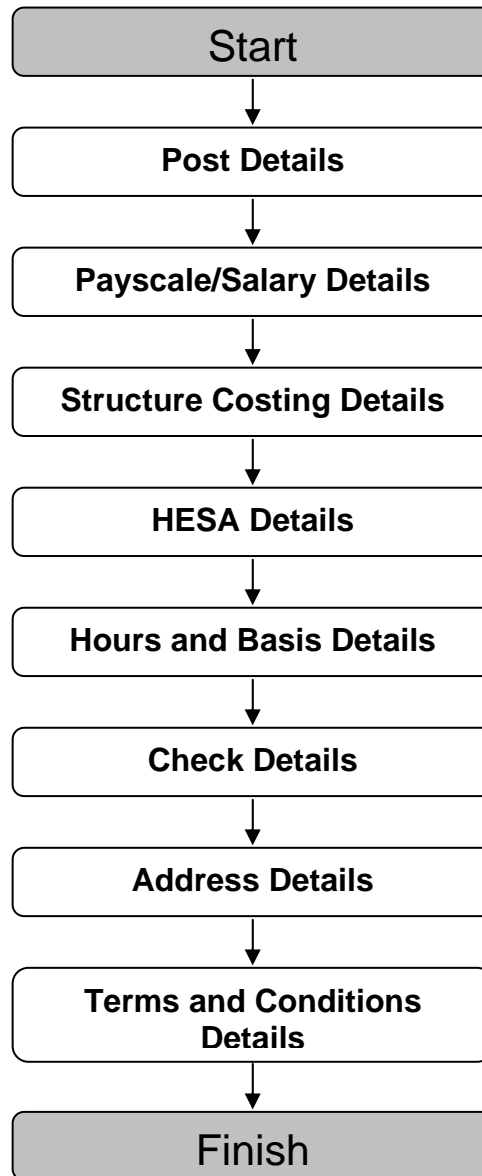


Process chaining:	
Process chain	<input type="text" value=""/>
	<ul style="list-style-type: none">New Post (graded) with split costingNew Post (ungraded)New Post (graded)New post (ungraded) with split costing

Which is used depends on the post being defined. Look at the funding section of the CHRIS/1 or CHRIS/2 form to establish if you require the New Post (graded) or New Post (graded) with split costing screen chain. Appointments that are created using the New Short-Term (ungraded) Appointment – CHRIS/11 form will require one of the ungraded screen chains. Look at the pay details and funding sections of the New Research Appointment CHRIS/12 form to establish which screen chain to use for a Research appointment. The following pages demonstrate how each of these is used.

4.1 New Post

The New Post process chain encompasses many of the Trent forms that allow you to add key data to newly created Posts. The following diagram shows the forms encountered in the chain.



4.2 Starting the Process

Navigate: Organisation > Posts > Search for New Post > Process Chaining > Process Chaining

If you have just created the new Post ensure this is selected. If not:

1. Select the University of Cambridge organisation
2. Select the Posts menu item from the Action Pane
3. Search for the Post to be maintained
4. Select the Process Chaining menu from the Action pane



5. Select the Process Chaining option and type in the required date in the effective date field.

4.3 Creating a New Post - Graded

1. The resulting form will allow you to select the required Process Chain from the picklist available.

Process chaining:

Process chain	<div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px;"> ▼ </div> <div style="border: 1px solid #ccc; background-color: #e0e0e0; padding: 2px; margin-top: 2px;"> <div style="background-color: #003366; color: white; padding: 2px;">New Post (graded) with split costing</div> <div style="padding: 2px;">New Post (ungraded)</div> <div style="padding: 2px;">New Post (graded)</div> <div style="padding: 2px;">New post (ungraded) with split costing</div> </div>
---------------	--

2. Select New Post (graded) and click on the Start button to commence the process. The first step will then be presented (Post Details).

Step 1 of 8

Chain: New post (graded)

▶

Post details: Clerk


Post	Clerk
Start date	01/02/2007
End date change?	<input type="checkbox"/>
End date	
Post reference	50000057
Current status	Live
Job share	<input type="checkbox"/>
Suspend from	<input type="text"/> 📅
Suspend to	<input type="text"/> 📅
Probationary period	<input type="text"/> <input type="text"/> ▼ II
Location	<input type="text"/> II
Structure group 1	Other Institutions ▼ II
Structure group 2	<input type="text"/> ▼


Third party return details

Teacher

Save

Delete

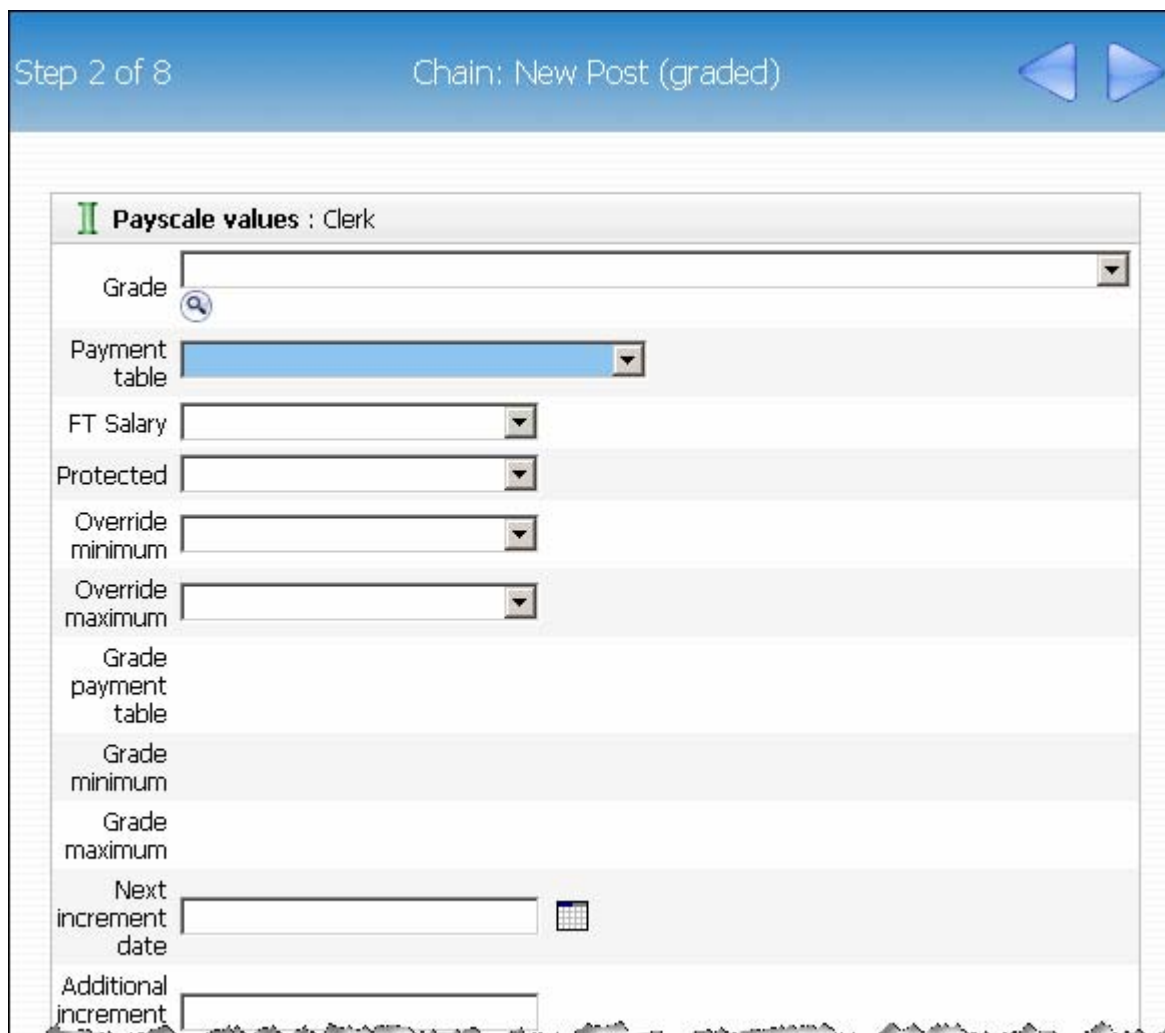
3. Click the  button. The following message will appear at the top of the screen.

 Changes have been saved.

It is essential to save this first screen before you proceed to the next steps

4.3.1 Payscale Values

1. Click on the Next Step button, this will present you with the form used to enter the Grade Details



2. Choose the required grade from the drop down list
3. The payment table will automatically be filled from the above
Note that the Grade minimum and Grade maximum will display the bottom and

Post and Position



top service point of the chosen grade.

Step 2 of 8 Chain: New Post (graded) ◀ ▶


II Payscale values : Clerk



Grade	Grade 4
Payment table	National Spine
FT Salary	
Protected	
Override minimum	
Override maximum	
Grade payment table	National Spine
Grade minimum	18,157.00
Grade maximum	20,436.00
Next increment date	<input type="text"/>
Additional	<input type="text"/>


4. Click the  button

4.3.2 Structure Costing


1. Click on the Next Step button, this will present you with the form to enter the Structure Costing information.

Step 3 of 8 Chain: New Post (graded) 

Structure costing: Structure, No. 1	
Organisation Organisation default cost code ERROR	
Rule Rule name <input type="text" value="UC1"/> 	
Level details No. 1 Costing level <input type="text" value="Structure"/> Length 24 Cost code <input type="text" value="No Default Code Applies."/> Percent <input type="text" value="100.000"/> Start date 04/04/2007 End date <input type="text"/> 	

2. Replace "No default code applies" in the Cost Level field, with the relevant string in the "Cost Code" field, 100 will automatically be entered in the "Percent" field.
3. Click the  button

4.3.3 HESA Details


1. Click the Next Step button
This will take you to the HESA details screen. This is a large screen. Use the full screen button  to view the information more easily.

Step 4 of 8 Chain: New Post (graded)

HESA details: Clerk

Campus identifier	Entire Institution	II
Senior management post	<input type="checkbox"/>	II
Atypical	<input type="checkbox"/>	II
Exclude from HESA return	<input type="checkbox"/>	II
Principal source of basic salary		
Secondary source of basic salary		
Percentage of salary charged against general income		II
NHS contracts		II
NHS contract grade		II
Healthcare professional speciality		II
Academic employment function	Not teaching and/or research	II
HEI joint contracts		
Code		Cost centre
Activity 1		Central Administration and Se

2. The Campus Identifier will be automatically inherited
3. Leave Senior Management Post blank. It will be maintained by the HESA correspondent.
4. The Atypical checkbox will be set by inheritance and any further maintenance will be done by the HESA correspondent
5. Exclude from HESA return will be set by inheritance if the Employment Basis is in Chairmanship/Headship, College Officer, Roll of Regent House records, Excluded Classes, Research Student, Associate and Affiliated Lecturers.
6. Use the drop down lists to input principal source of basic salary. The source for this information is the costing information section of the appropriate post/appointment form. It may be necessary to perform a look up in CUFS in some cases.
If the post is "Wholly general institution financed" the Secondary source of basic salary will autofill to "None" and the Percentage of salary charged against general income will autofill to "100%".

-
7. Secondary source of basic salary only needs to be set when the costing is split. If the Institution is funding a minority percentage of the post (between the ranges 0 – 49%), set the Secondary source of basic salary to “Partly (not mainly) financed by the Institution”
 8. Percentage of salary charged against general income: set to 0 if wholly externally funded. Set to a number between 0 and 50 if the funding is split and one component of the funding is “Partly but principally financed by the Institution”. Trent will set this to 100% automatically if “Wholly Institution Funded” is selected for Principle source of basic salary.
 9. NHS contract grade is applicable only for Clinical appointments. See HESA appendix.
 10. Healthcare professional speciality is applicable only for Clinical appointments. See HESA appendix.
 11. Academic employment function will be set by inheritance and should not need to be maintained.
 12. HEI is always left blank as the University does not issue joint contracts with other HEI’s.
 13. Activity Code 1 will be set for all Academic and Research appointments. This field must be set for all non Academic and non Research posts at post creation time. The source for this information is the Post creation form.
 14. Activity codes 2 and 3 are not used.
 15. Cost Centre can be left at the inherited value. Any overrides will be provided by the HESA correspondent.
 16. Percentage can be left at the inherited value of 100%
 17. Click the  button

4.3.4 Hours and Basis Details

1. Click on the Next Step button

Step 5 of 8 Chain: New Post (graded)

Post hours and basis : Clerk		
Post hours	<input type="text" value="36.50"/>	II
FTE hours	<input type="text" value="36.50"/>	II
Budgeted hours	<input type="text"/>	II
Allocated FTE	0.00	
FTE variance	0.00	
Allocated hours	0.00	
Unallocated hours	0.00	
Headcount	0	
Annual weeks worked	<input type="text" value="52.25"/>	II
Category	<input type="text"/>	
Basis	<input type="text" value="Assistant"/>	II
Type	<input type="text" value="Assistant CS"/>	II
Change reason	<input type="text"/>	
FTE details		
FTE value	1.00	

2. Check the inherited details on this form and amend details for hours, category, basis and type according to the details provided on the New Post Request Form as necessary
3. Click the button

4.3.5 Check Details

1. Click on the Next Step button

Step 6 of 8 Chain: New Post (graded)

Check details: New

Name

Essential

Start date

End date

Save

2. The New Check Details screen will be displayed.

If no checks are required, use the next step arrow to advance to step 7.

The Right to Work check is a requirement for every Post. This is an inheritable item set very high up in the organisation and does not require setting as part of the screen chain.

Where a Criminal Records, OH Medical or Security check is required for the Post, click the drop down arrow to the right of the name field and select the check.

Step 6 of 8 Chain: New Post (graded)

Check details: New


Name

Essential

Start date

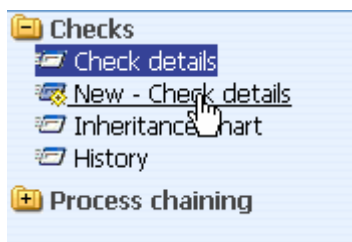
End date

Save

3. Tick the essential box and complete the start date.
4. Click the  button



5. If additional checks are required – Criminal Records or Security, select New Check Details



6. Click the drop down arrow to the right of Name and select the required check

Step 6 of 8 Chain: New Post (graded)

Check details: New

Name	<input type="text"/>
Essential	<input type="checkbox"/>
Start date	<input type="text"/>
End date	<input type="text"/>

Security

7. Check the Essential box and enter the date

Step 6 of 8 Chain: New Post (graded)

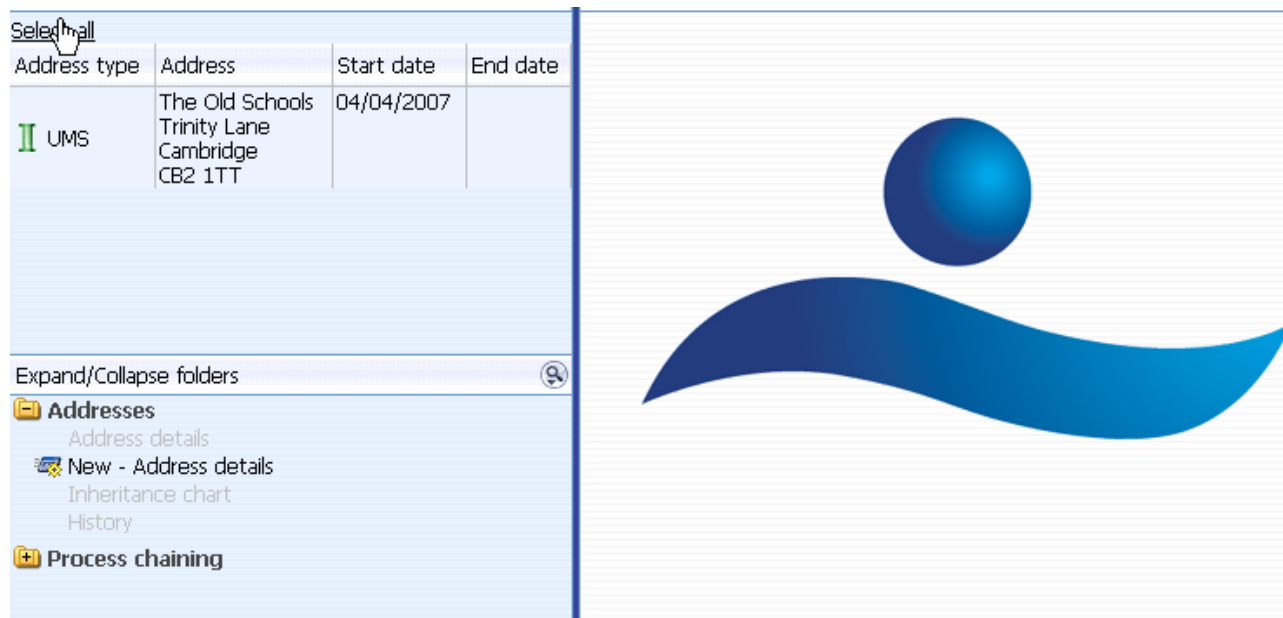
Check details: New

Name	<input type="text" value="Security"/>
Essential	<input checked="" type="checkbox"/>
Start date	<input type="text" value="04/04/07"/>
End date	<input type="text"/>

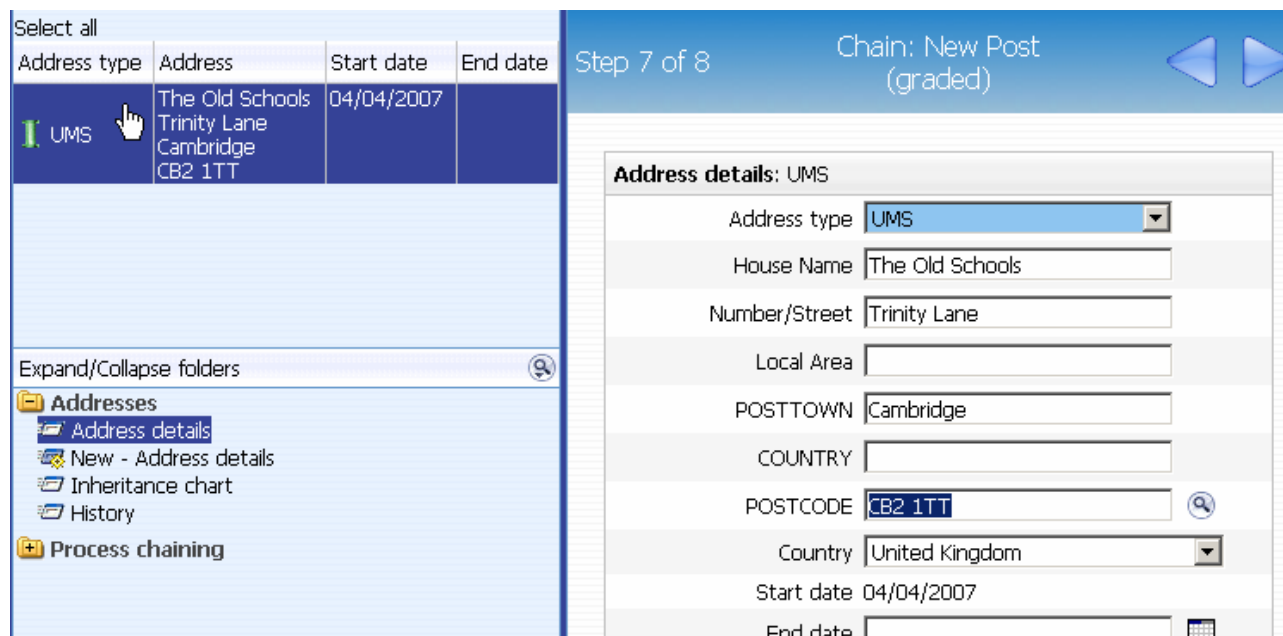
8. Click the  button

4.3.6 Address Details

1. Click on the Next Step button



2. The current UMS address for the Post will be displayed
3. Select this address in the object pane



4. This will then display step 7 of the chain. There should be no need to amend this data.

4.3.7 Terms and Conditions Details

1. Click on the Next Step button.

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

Step 8 of 8 Chain: New Post (graded)

Terms & conditions : New

T&C Item: [Dropdown]

Choice: [Dropdown]

Notes: [Text Area]

Start date: [Date Picker]

End date: [Date Picker]

Save

2. The inherited Terms and Conditions for the Post will be displayed. Check these details (e.g. Final Salary Scheme is CPS or USS as appropriate), again there should be no need to amend these details

Click on the new Post in the navigation trail to leave the screen chain and view the mini explorer

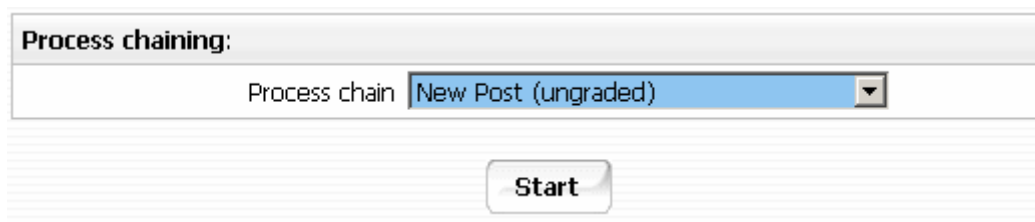
[Organisation: University of Cambridge](#) >
 [Posts: Clerical Assistants](#) >
 [Posts: Clerk](#) >
 [Terms & Conditions: OSP - Sickness](#) >
 [New - T&C details \(structure\)](#)

4.4 New Post (Ungraded)

The process for adding details to a New Post (Graded) is similar to that used for the New Post (Ungraded) process, with the following differences.

4.4.1 Starting the Process

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



Process chaining:

Process chain

4.4.2 Salary Details

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

Step 2 of 8 Chain: New Post (ungraded)

II Salary details : Clerk

Grade

FT Salary

Override minimum

Override maximum

Grade minimum

Grade maximum

Protected rate of pay

FTE value 1.00

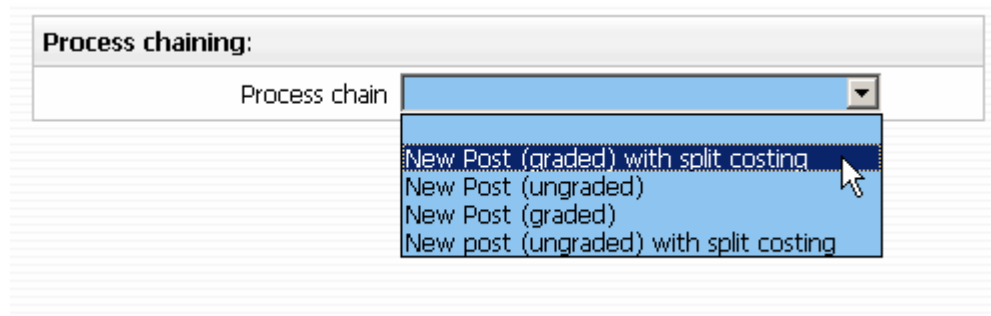
Pro-rated rate of 0.00 pay

Change reason

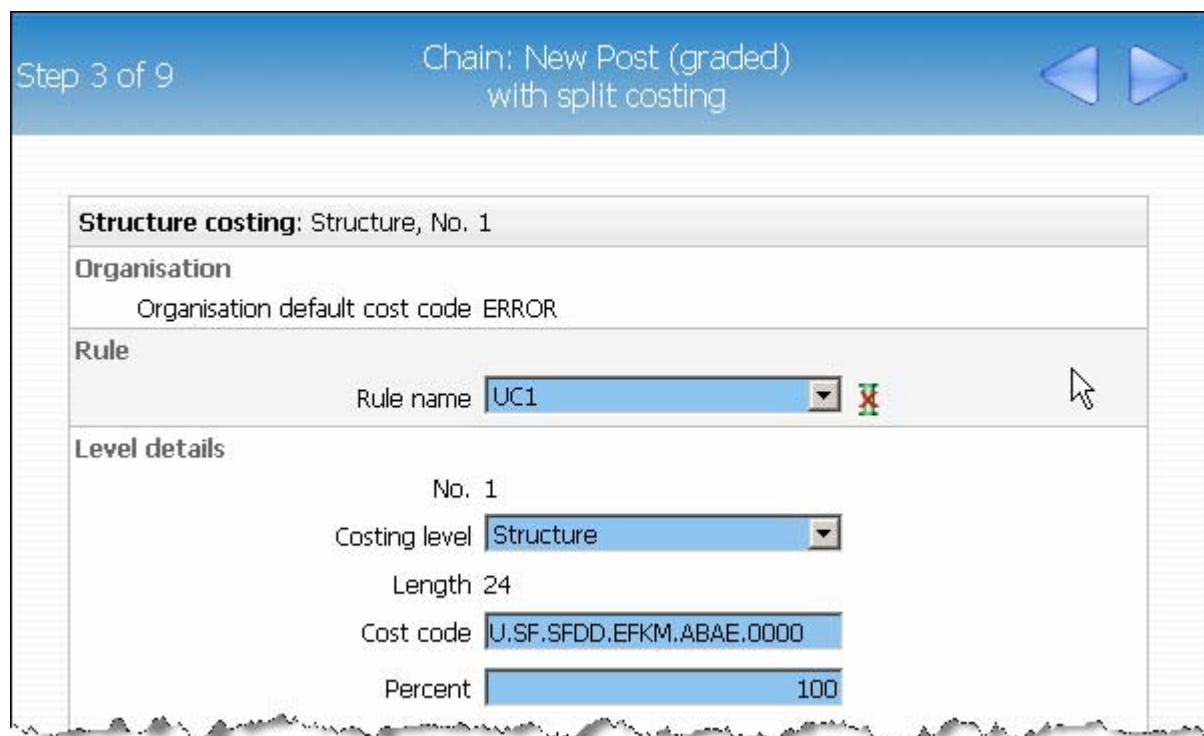
If the Post is that of a Marie Curie Fellow, Student, KTP Associate, Slade Professor of Fine Art, Proctor, Pro-Proctor or Additional Pro-Proctor select the “grade” from the top drop down box for labelling purposes. Select the frequency of salary, and save the details.

4.5 New Post with Split Costing

The Costing section of the new post request form can be used to determine whether a post is to be funded from more than one account code. If this is the case then select the appropriate screen chain – New Post (graded) with split costing, or New post (ungraded) with split costing. These screen chains contain the same forms as previous with the addition of an extra form to allow split costing.



1. Complete the screen chain as previous instructions.
2. At step 3 enter the first cost code as instructions above



- Step 4 of the process chain will open the “split” costing form

Step 4 of 9 Chain: New Post (graded) with split costing

Structure costing: New

Organisation
Organisation default cost code ERROR

Rule
Rule name UC1

Level details
No. 2
Costing level Structure
Length 24
Cost code
Percent
Start date 02/04/2007
End date

Split records

	Cost code	Percent	Delete?
No.1	U.SF.SFDD.EFKM.ABA	100.000	<input type="checkbox"/>

- Enter the details for the second code and the percentage and adjust the percent for the first code in the box called “split records”. The total % must be 100 at all times.
- Click the **Save** button
- Step 5 will continue with the HESA details as previously

4.6 Creating a Position

Once a post has been created it is then necessary to create a position. If a person is to occupy a post it is always by means of an intermediate position. Positions are a location in the Organisation structure in which a person can be placed.

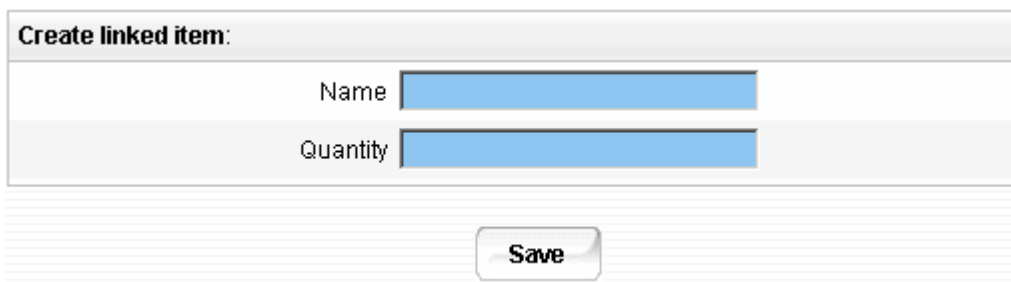
A blue position icon  indicates it is occupied by a person

A green position icon  indicates a vacant position

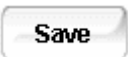
A position always belongs to a Post.

Navigate: Organisation > Posts > Create Position

1. If you are completing this step straight after completing the new post screen chain use the navigation trail to navigate back to the mini explorer and ensure that the post under which you wish to create the new position is selected.
2. Click the Create Position option in the Action Pane
Trent opens the Create linked item page in the display pane



Create linked item:	
Name	<input type="text"/>
Quantity	<input type="text"/>

3. Enter a name for the new position.
The Post name is the 'formal' title and the position name is the 'in-house' title.
4. Enter a quantity of 1
5. Click the  button on the create linked item page to save your changes.
Trent adds the new Position to the Organisation structure and the explorer diagram is updated accordingly, showing a vacant (green) chair for the position.

4.6.1 Position Reference number & position status

A position reference number is automatically generated by Trent when a position is created. To enable you to easily identify this position when attaching a person it is advised that you make a note of the position number once you have created it.

1. Select the position created from the mini explorer.
2. Select position details from the action pane
3. View and record the position reference number

Position details: Administrative Officer Grade I	
Job title	Administrative Officer Grade I
Start date	01/02/2007
End date change?	<input type="checkbox"/>
End date	
Position reference	70000015
Probationary period	<input type="text"/> <input type="text"/> II
Location	<input type="text"/> II
Occupant	Vacant
Reporting unit	Training
Reports to	Administrator
	Vacant (01/02/2007 -)
Expected position end date	<input type="text"/>
Expected position end reason	<input type="text"/>
Structure group 1	Other Institutions II
Structure group 2	<input type="text"/>
Position status	
Position status	<input type="text"/>

4. Where required enter the Position Status

Position status	
Position status	<input type="text"/>
Third party return details	
Teacher	<ul style="list-style-type: none"> Pending Authority No permission status Held in abeyance Held vacant to create savings Permission to Fill granted

-
5. For a new position the position status will automatically be set to permission to fill granted. When the position status is changed to permission to fill on the strength of a letter from the Resource Management Committee section, the letter reference number ("ACD reference") is to be put in the Change Reason box.

Note: Pending authority position status is used for migration purposes only.

4.7 Creating a Position on a temporary basis

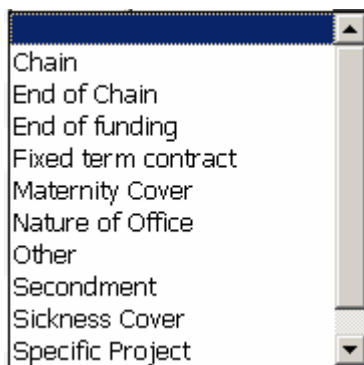
To create a temporary position it is necessary to also make use of Expected position end date and expected position end reason fields within position details.

1. Create a position following the instructions in 4.6
2. Select the position created from the mini explorer
3. Select position details from the action pane
4. Enter the date when the position is expected to end. This information is the equivalent in SECQUS of entering a post expiry date.
The date is for information purposes and will not end the position at that date.
The information source is the New Post Request form CHRIS/1 or CHRIS/2 or New Casual Appointment CHRIS/11 or New Research Appointment CHRIS/12 form



The screenshot shows two input fields. The first is labeled 'Expected position end date' and contains the text '01/02/2008' next to a calendar icon. The second is labeled 'Expected position end reason' and is a dropdown menu.

5. Enter the reason for the position ending by selecting from the drop down box



6. Click the  button

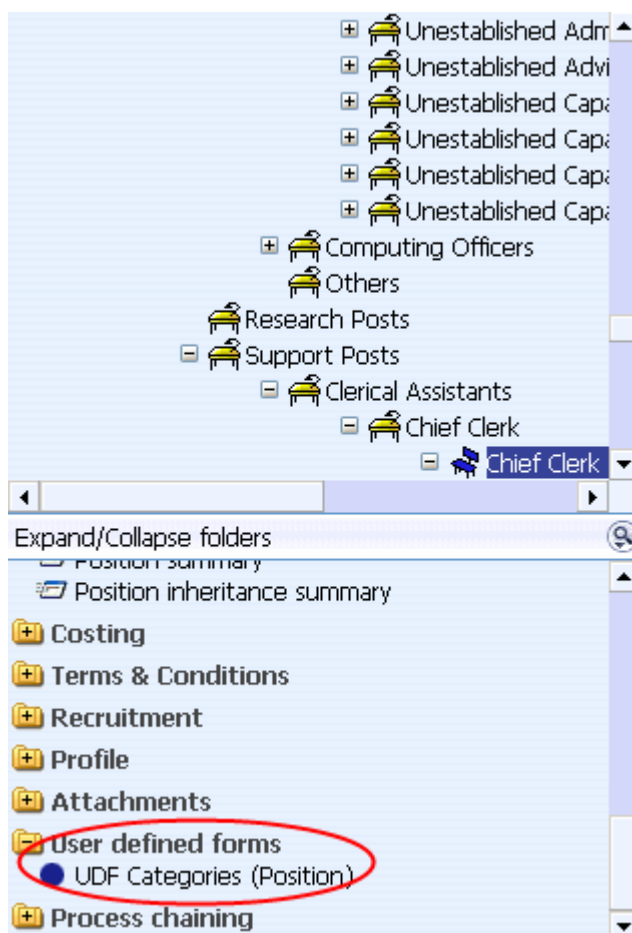
4.8 User Defined Fields

Some of the data required for Cambridge University will be held on fields in forms that are not standard with the Trent application, these are referred to as User Defined Fields (UDFs).

4.8.1 Role Code Number


Posts that go through Pay and Grading are given a Role Code Number and this information is being migrated into Trent. Where a position has been assigned a Role Code Number this can be viewed in the User defined fields.



1. Select the position
2. Select the User defined forms menu and choose UDF Categories (Position)



3. Select Role Code Number from the list of UDF Categories and click on UDF Details (Position).


UDF Category	No. of rows
<input type="radio"/> Invigilator Rate	0
<input type="radio"/> Location	0
<input type="radio"/> NHS Trust Information	0
<input type="radio"/> Research Group	0
<input checked="" type="radio"/> Role Code Number	1
<input type="radio"/> University Office	0




Expand/Collapse folders 

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

4. The Role Code reference will be displayed

Reference
<input checked="" type="radio"/> 2503

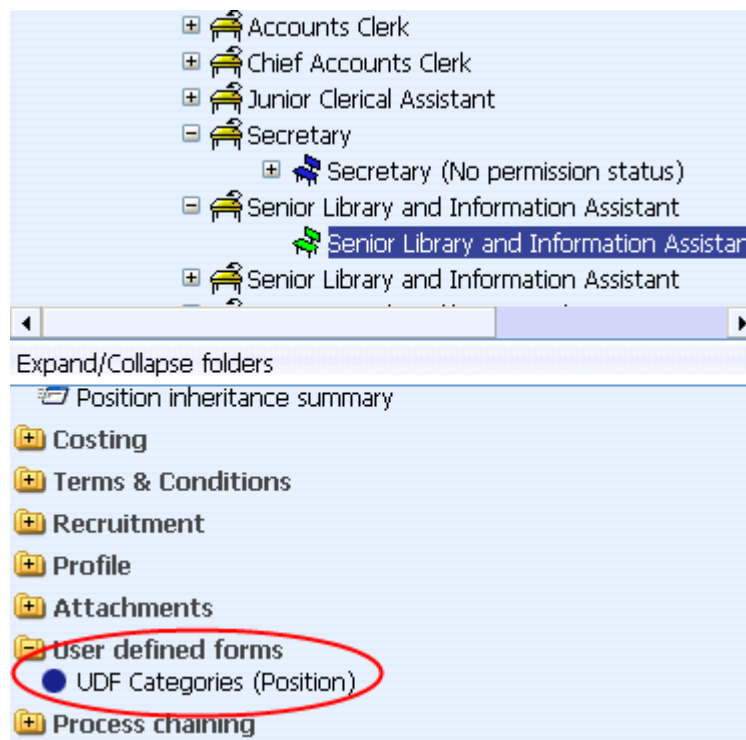
Expand/Collapse folders 

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

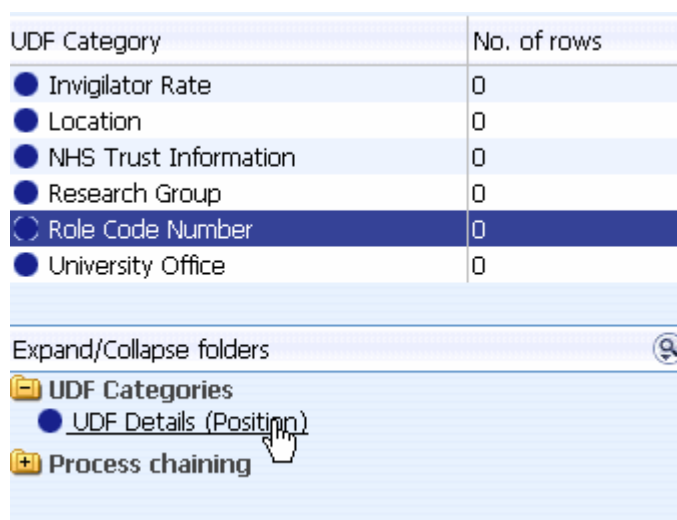
4.8.2 Adding Role Code Number

The Grading and New Post Request Form CHRIS/1 will be used to record the Role Code Number where applicable. This number should then be recorded in Trent in the UDF Details for the position.

5. Select the newly created position
6. Select User defined forms and then UDF Categories (Position)



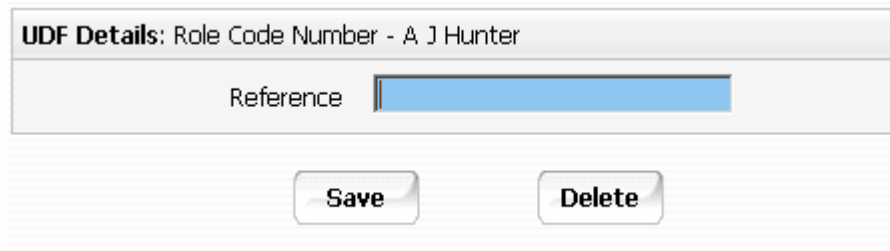
7. Select Role Code Number from the list of User Defined Fields and click on UDF Categories (Position)



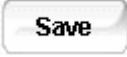
-
8. Select New – UDF Details (Position)



9. Key in the Role Code Number



A screenshot of a form titled 'UDF Details: Role Code Number - A J Hunter'. The form has a 'Reference' field with a blue selection bar. Below the field are two buttons: 'Save' and 'Delete'.

10. Click the  button

4.8.3 University Office

Where an established office position has been created from a CHRIS/1 or CHRIS/2 form the UDF should be used to record the University Office. This information is used in the establishment Report.

1. Select the newly created position
2. Select User defined forms and then UDF Categories (Position)
3. Select University Office from the list of User Defined Fields and click on UDF Categories (Position)

UDF Category	No. of rows
<input checked="" type="radio"/> Invigilator Rate	0
<input checked="" type="radio"/> NHS Trust Information	0
<input checked="" type="radio"/> Roll Code Number	0
<input checked="" type="radio"/> University Office	0

Expand/Collapse folders

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

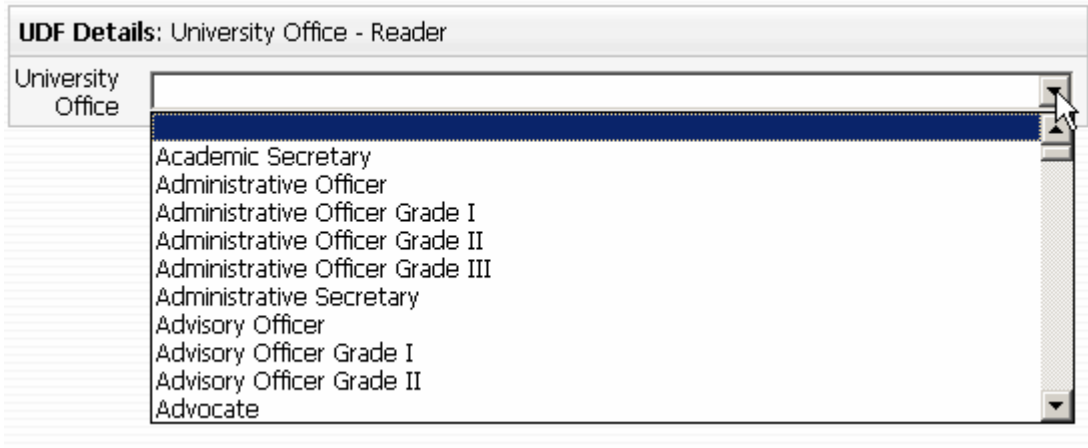
4. Select New – UDF Details (Position)

University Office

Expand/Collapse folders

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

-
5. Select the appropriate University Office from the drop down box.



UDF Details: University Office - Reader

University Office

- Academic Secretary
- Administrative Officer
- Administrative Officer Grade I
- Administrative Officer Grade II
- Administrative Officer Grade III
- Administrative Secretary
- Advisory Officer
- Advisory Officer Grade I
- Advisory Officer Grade II
- Advocate

Click the Save button