Posts & Positions

1 Introduction

The purpose of the user guide is to provide information, procedures and instructions to help you maintain Post and Position structure information within the Trent HR system.

1.1 Introduction to 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. Most users will only see the University of Cambridge Organisation. There is also a Pensioners organisation which will be accessible to some users.

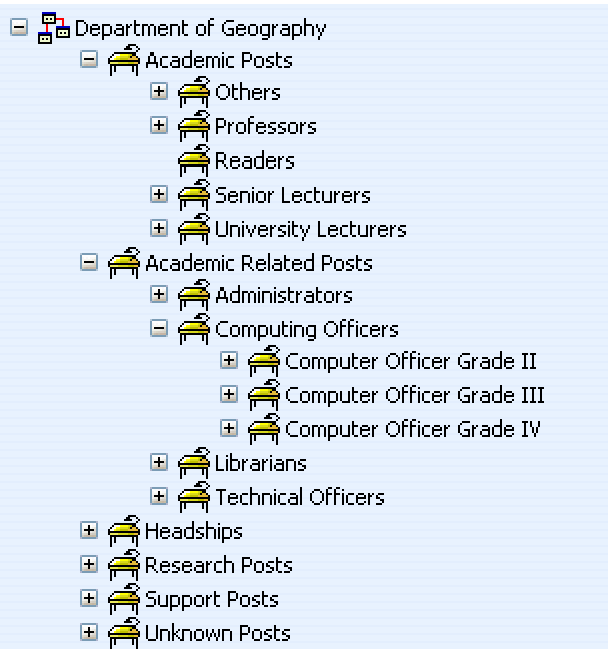
Unit

A unit is an organisation structure component that is made up of subordinate components including other units and posts. For example Colleges are a unit and each individual college – Christ's, Churchill, - a unit within this main unit.

Post

A post always belongs to a superior organisation unit, e.g. a department. If a person is to occupy a post it is always by means of an intermediate position. Within the organisation structure of the University there is a post for each position.

Within Cambridge we have allocated different staff groups to posts and this is displayed as three levels of posts within the Trent structure.



This screen displays the Department of Geography Unit.

Level 1 posts are Academic, Academic Related, Headships, Research, Support (and Unknown).

Level 2 posts are shown below this – Administrators, Computing Officers, Librarians and Technical Officers within Academic Related Posts.

Level 3 posts are Computer Officer Grade II, III & IV shown beneath Computing Officers

Position

A position is a location in the Organisation in which a person can be placed. If the chair icon is blue the position is occupied.

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

If the chair icon is red it indicates that the position is vacant and has a recruitment requisition attached to it.

Employee

Each employee within the University that is attached to the structure 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 a piece of data which binds an employee to a payroll

2 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.

2.1 Organisation Explorer

You can use the Organisation explorer to display the units, posts and positions within the University and how they have been organised within Trent.

1. Select University of Cambridge
2. Select Organisation Explorer
3. The top level of the organisation is displayed first with a plus icon next to it University of Cambridge. The plus sign indicates that there are further items to be displayed under this node. Click the plus sign to display the nodes.

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

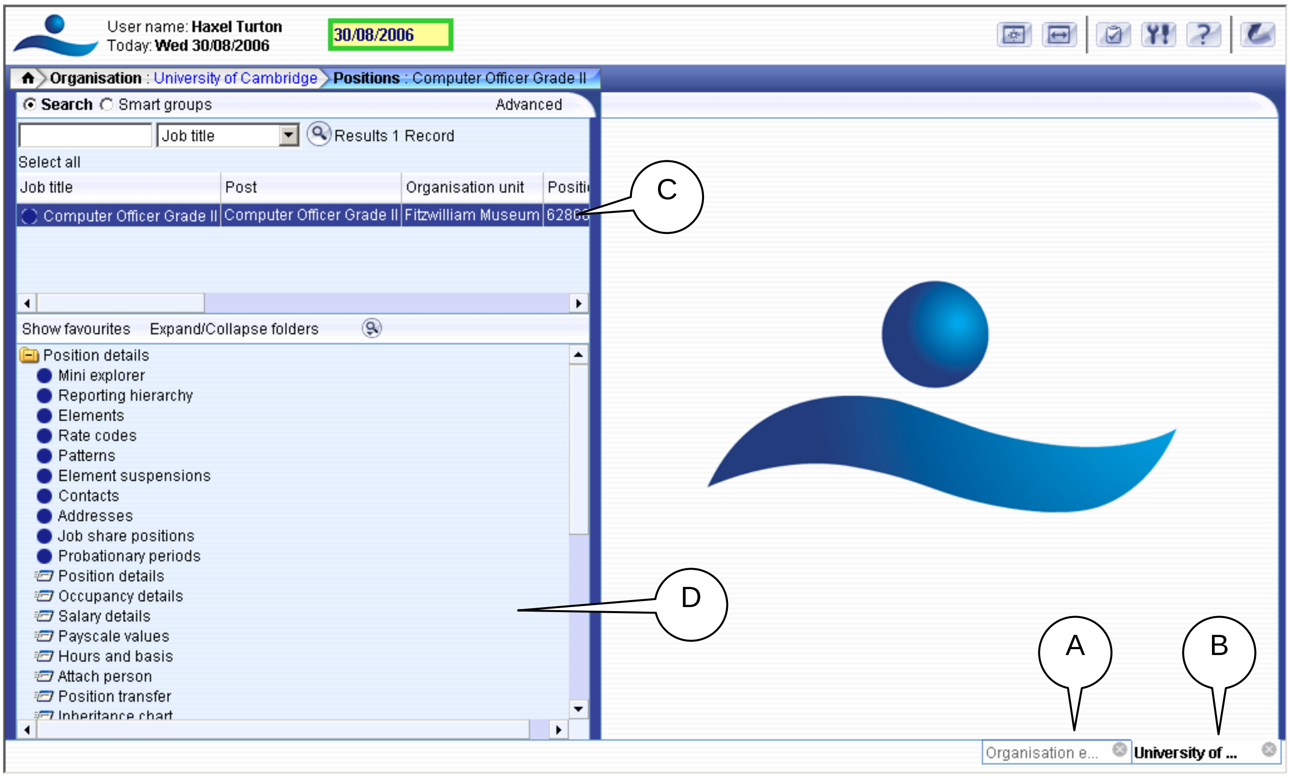
Clicking the minus icon condenses the node again.

When you reach the node that you are interested in, click on it.
The screen will then change as follows:

a) Trent will open a new View (B) leaving the original view (A) unchanged

b) The Object pane will change to a Search screen (C) for the type of object that you selected.

c) The Action pane (D) changes to display all of the actions that you can perform against that object.



You can now select any of the options available to you from the navigation displayed. The display will vary depending on the type of object that you selected.

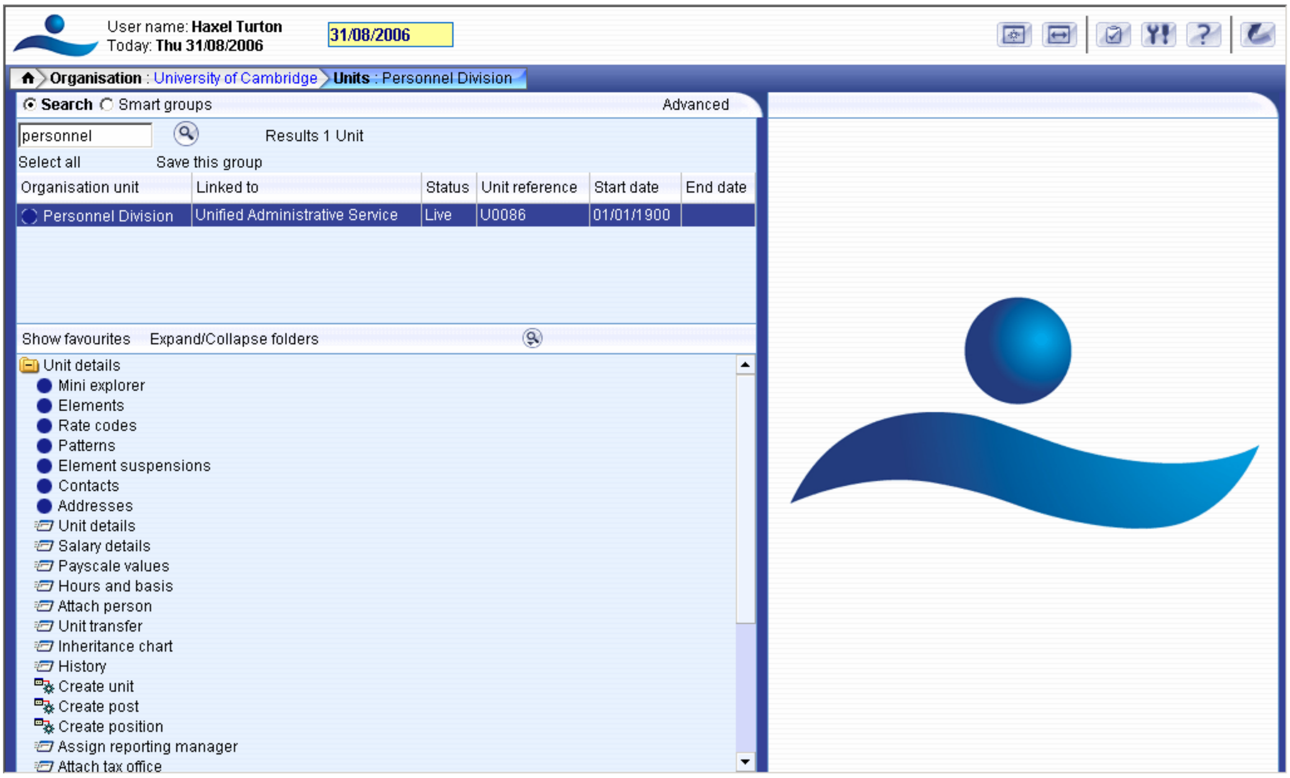
It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain items search for the unit, post or position and click the Mini explorer link in the action pane.

2.2 Mini Explorer

The Mini Explorer allows you to add new items to the Organisation structure as required and to view and maintain Unit, Post and Position details of the organisation structure for a specific area in the object pane.

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

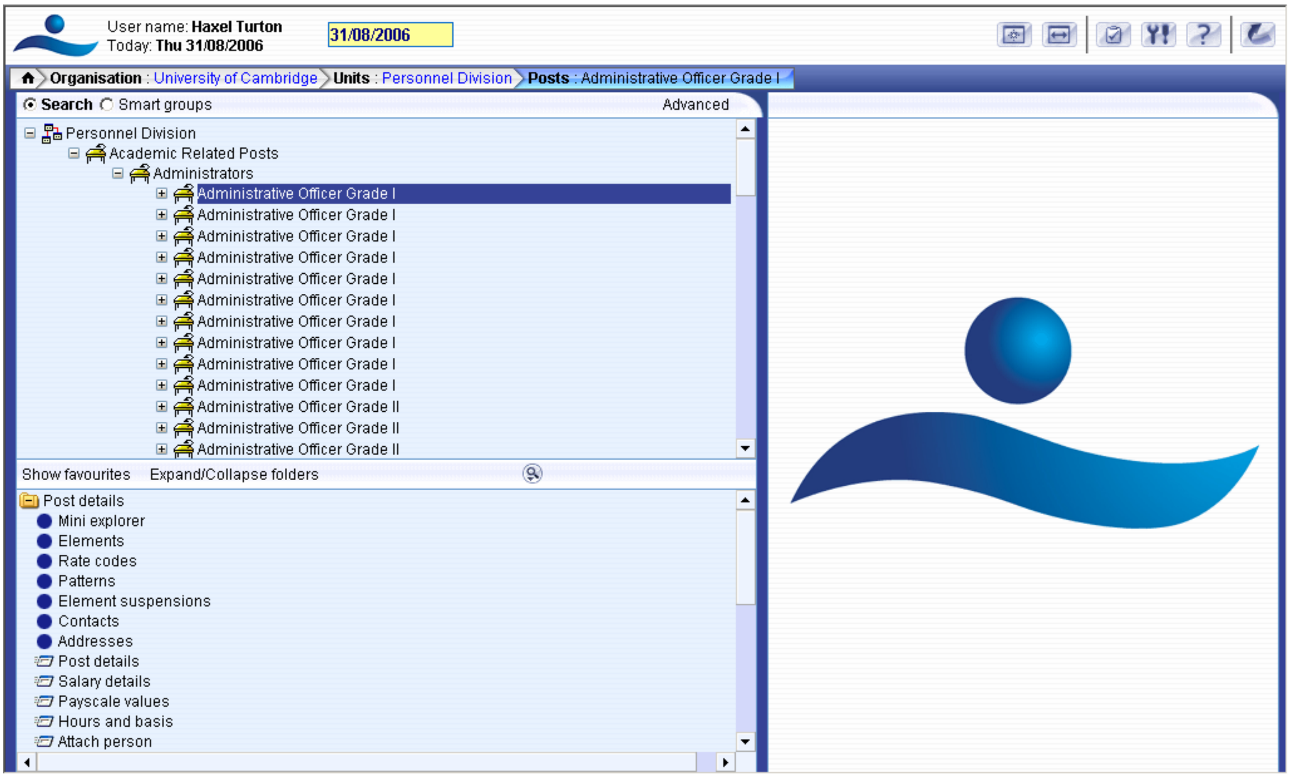
The mini explorer options are available for each of the different components that make up the structure (Units, Posts and Positions), and can be accessed in the relevant folder.



Use the search facility to locate the item you require. (See the introduction manual for more information about performing searches). Select from the object pane the item you wish to enquire on and click the Mini explorer link. The structure icon of the selected item will appear in the object pane.

Like the organisation explorer, the mini explorer structure diagram can be expanded by clicking the plus ⊞ icon next to items that contain lower levels.

The explorer view will appear within the Object pane. If you need to add, amend or view details within the mini explorer you can click on the relevant item and the appropriate folder items will be displayed in the Action Pane as usual.



2.2.1 To maintain existing data

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

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

2.2.2 Amending or entering new details

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

When you have completed an entry or amendment, click 

in the display pane to save the changes.

2.3 Creating a Post

All new Posts within the University, which are permanent or temporary, will be entered on to the CHRIS system by staff within Central Personnel based upon the details provided on the 'Grading and New Post Request Form' - CHRIS/1, 'New Post Request Form (Academic) - CHRIS/2, New Casual Appointment – CHRIS/11 or New Research Appointment – CHRIS/12

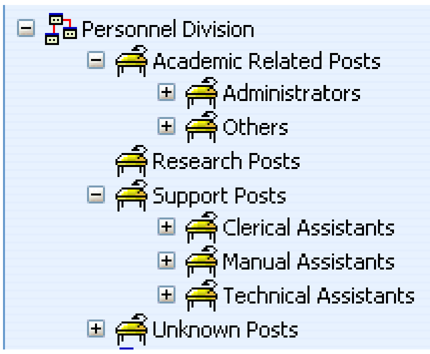
Posts are an intermediate part of the organisation structure.

A post always belongs to an organisation unit. Within Cambridge we have allocated different staff groups to posts and this is displayed as a three level structure of posts within Trent.

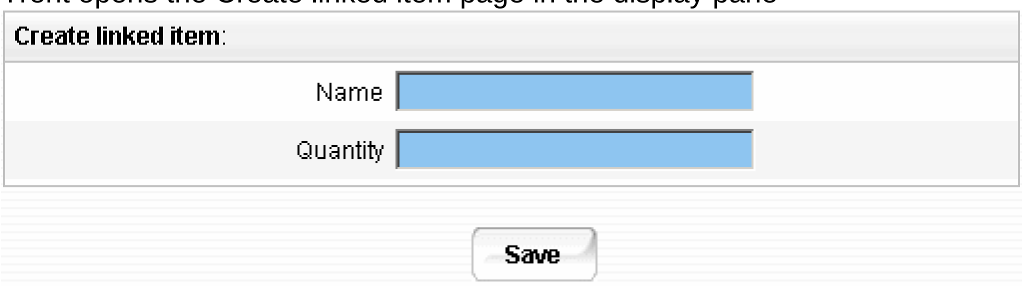
If a person is to occupy a post it is always by means of an intermediate position.

Within the University structure there will always be one post visible for each position. *

1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date for the start date of the post
3. Click Units in the Action pane and then search for the unit within which you wish to create the new post.
4. Open the Mini Explorer

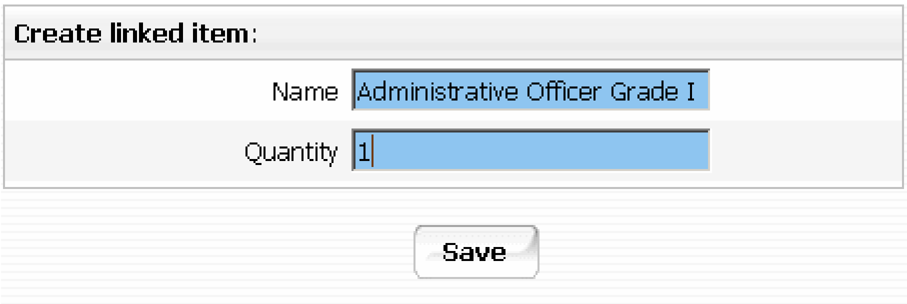


5. Select the Post within which you wish to create the level 3 post. For example Administrators if you were to create a new Administrative Officer Grade 1 post.
6. Click the Create Post option in the Action Pane
   Trent opens the Create linked item page in the display pane



* There is an exception to this rule for certain academic promotions, for example where a lecturer progresses through promotion to professor. This is covered later in the Senior Academic Promotions course.

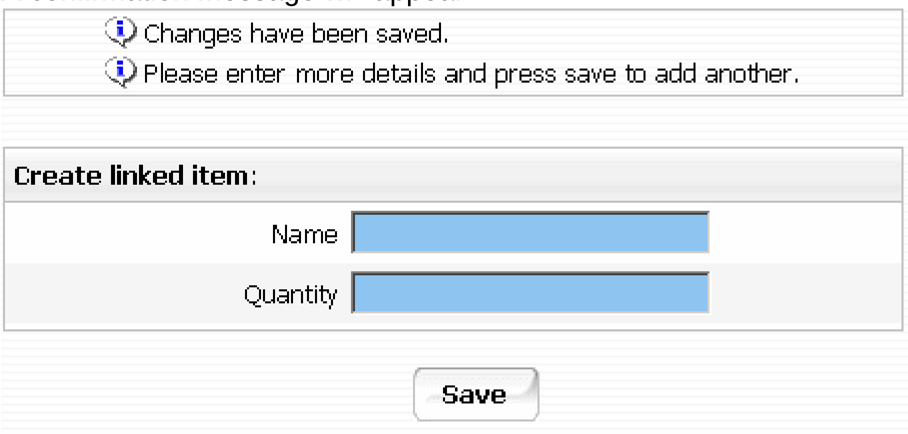
7. Enter the name for the new Post



8. Enter a Quantity of 1

9. Click the 

button on the Create linked item page to save your changes. A confirmation message will appear

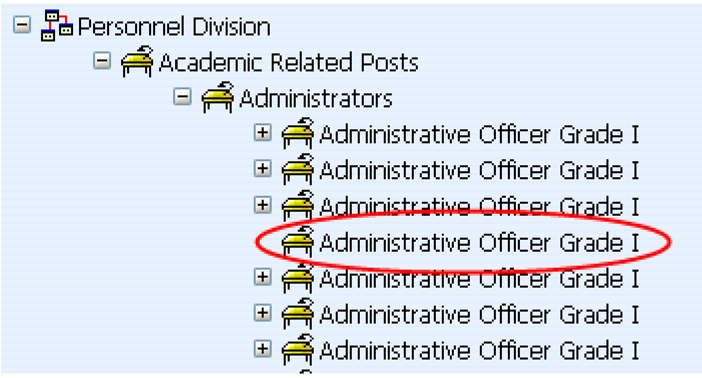


Trent adds the new Post to the Organisation structure and the explorer diagram is updated accordingly.

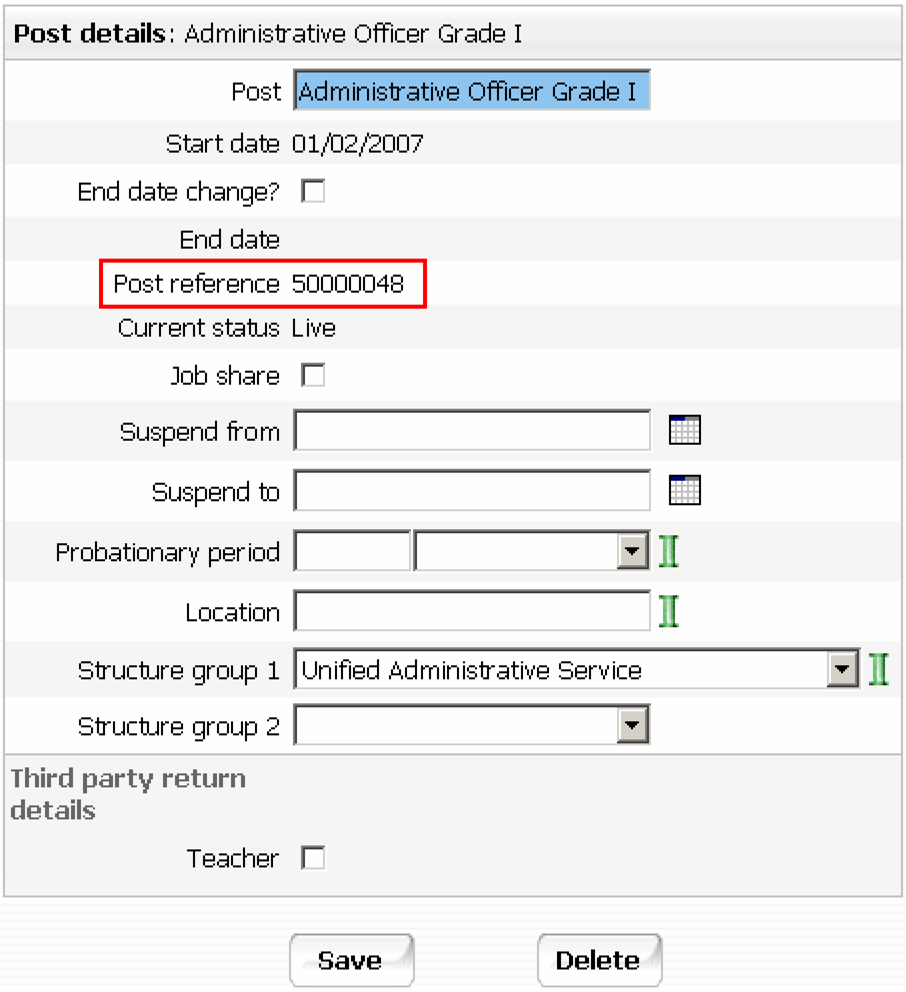
2.3.1 Post Reference Number

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

1. Select the new post in the Object pane (this will be the one without an expand button to the left of it)



2. Choose Post details and record the post reference number.



3 Process Chaining Principles

Process chaining is a facility in Trent that allows you to link forms and processes together into a logical sequence. There are several benefits for using these, however the main ones are:

- Users do not have to remember the form sequence that is used for the required process, such as New Starters.

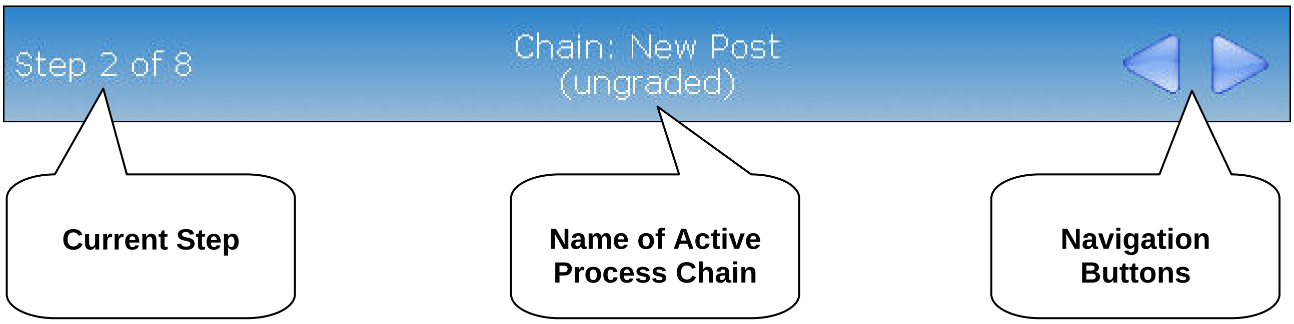
- Process chains can be stopped and restarted as required, therefore long processes can be completed in stages.

3.1 Starting a Process

Each process chain is linked to a type of record and is therefore accessed from the appropriate module/menu options. Details of each process, including where to find them will be explained later.

3.2 The Process Chain Bar

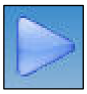
Completing forms within a process chain is the same as if you completed them independently, however when in a process chain you are given information about what you are currently doing along with the ability to navigate from step to step.



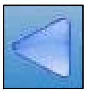
Once the first step within a process chain has been completed, you can add other details as required.

Note: It is essential to save the first step of the chain, even if no entries are made

To move onto the next step, click on the Next Step button in the top right corner of the form.



To go backwards through the process use the Previous Step button, also found in the top right corner of the form.



3.3 Stopping and Restarting the Process

Trent keeps a track on where you are in the process, therefore it is possible to stop the process at any point with a view to returning where you left off and continuing.

To stop the process, simply navigate away from the process chain. To restart the process from the place you left it follow the steps below.

1. Click on the To Do List button within the Control Bar

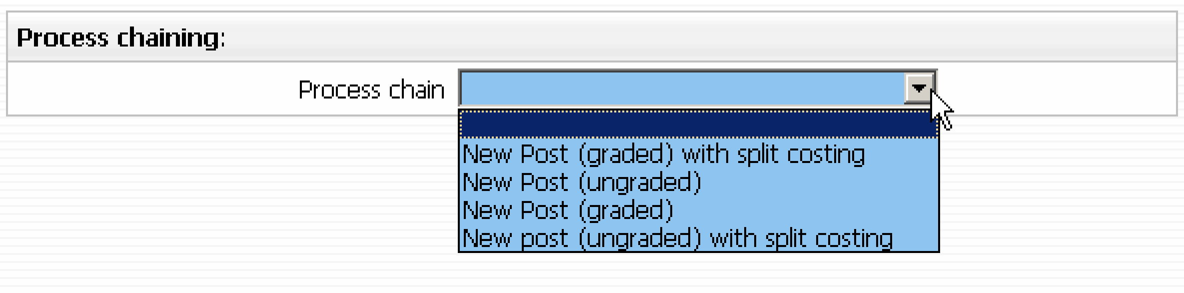
2. This will open the To Do List Pane.

3. Click on the process you would like to continue. Trent will open the Process Chain at the place indicated at the top of the task details.

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.

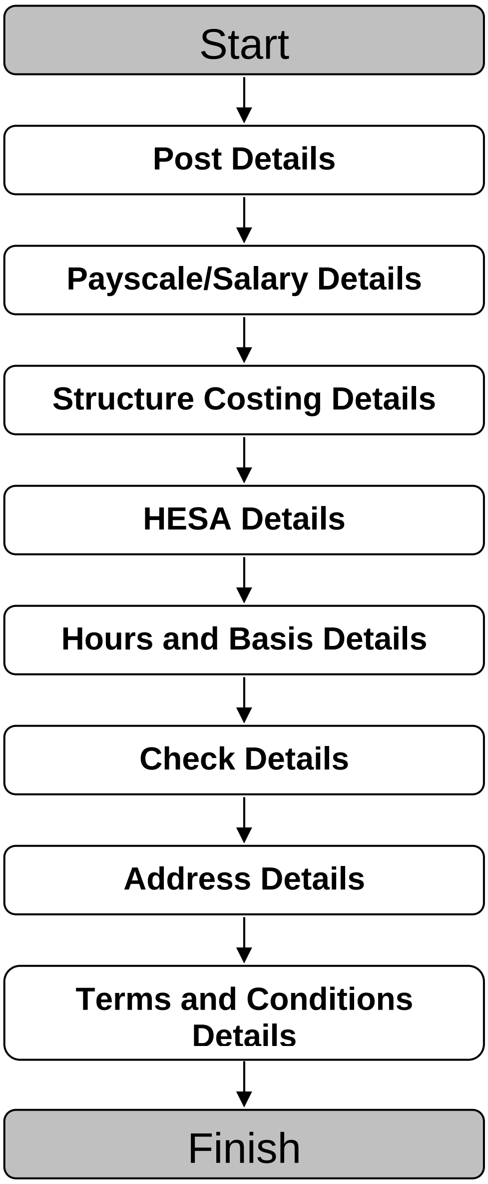
- New Post (Graded)
- New Post (Ungraded)
- New Post (graded) with split costing
- New Post (ungraded) with split costing



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

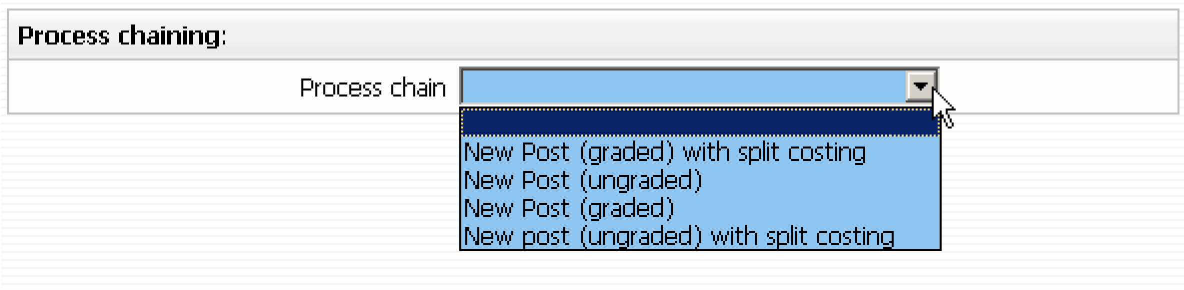
If you have just created the new Post ensure this is selected. If not:

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

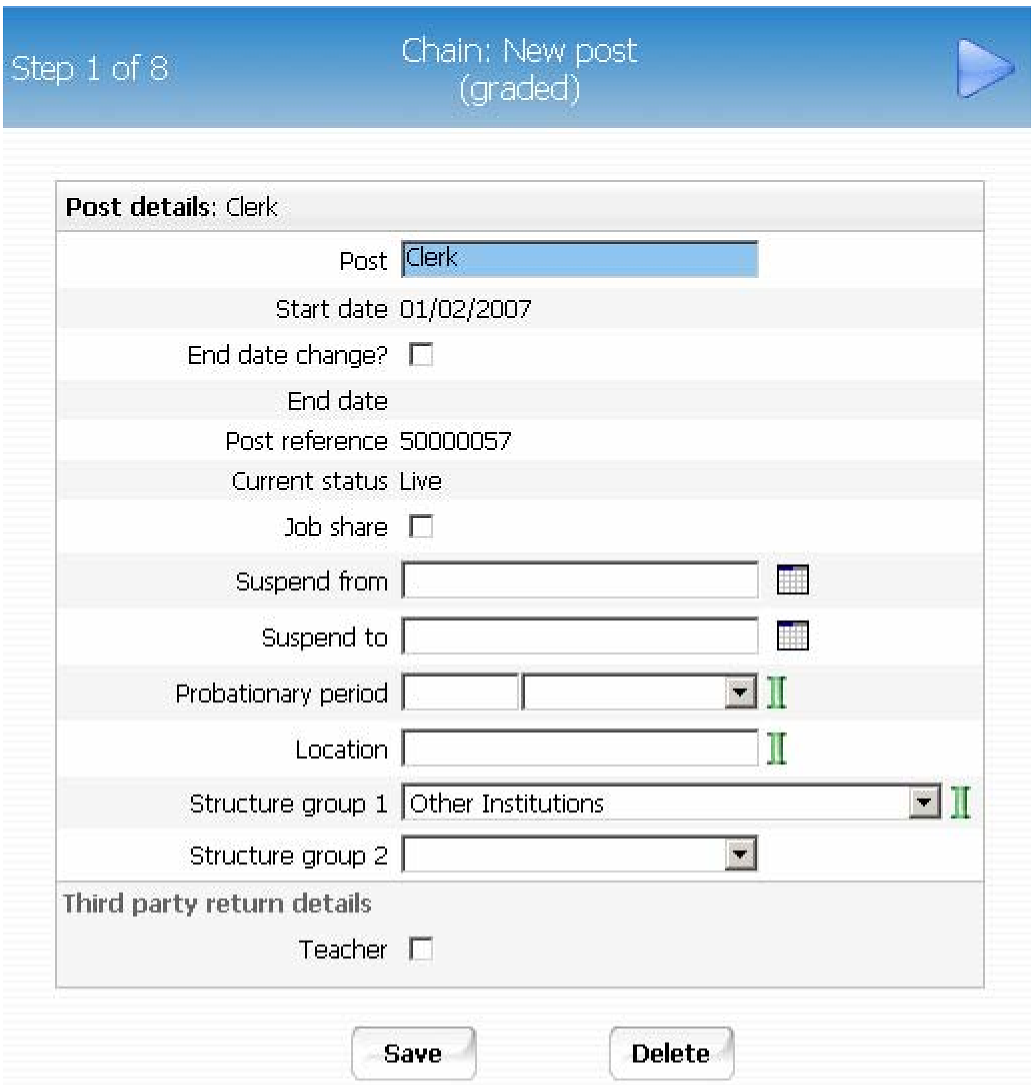
5. Select the Process Chaining option and type in the required date in the effective date field.

4.3 Creating a New Post - Graded

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



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

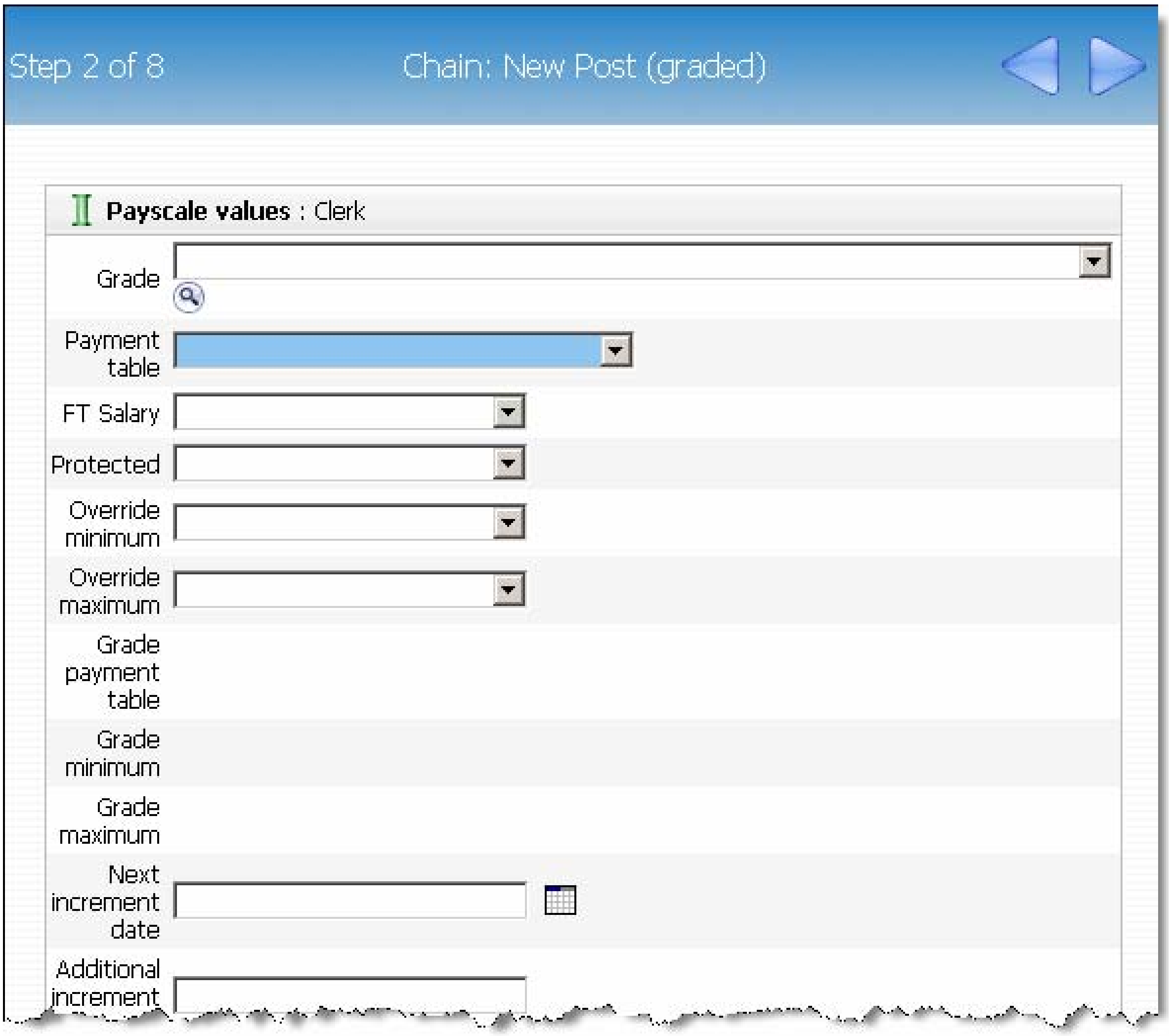


3. Click the **Save** button. The following message will appear at the top of the screen.

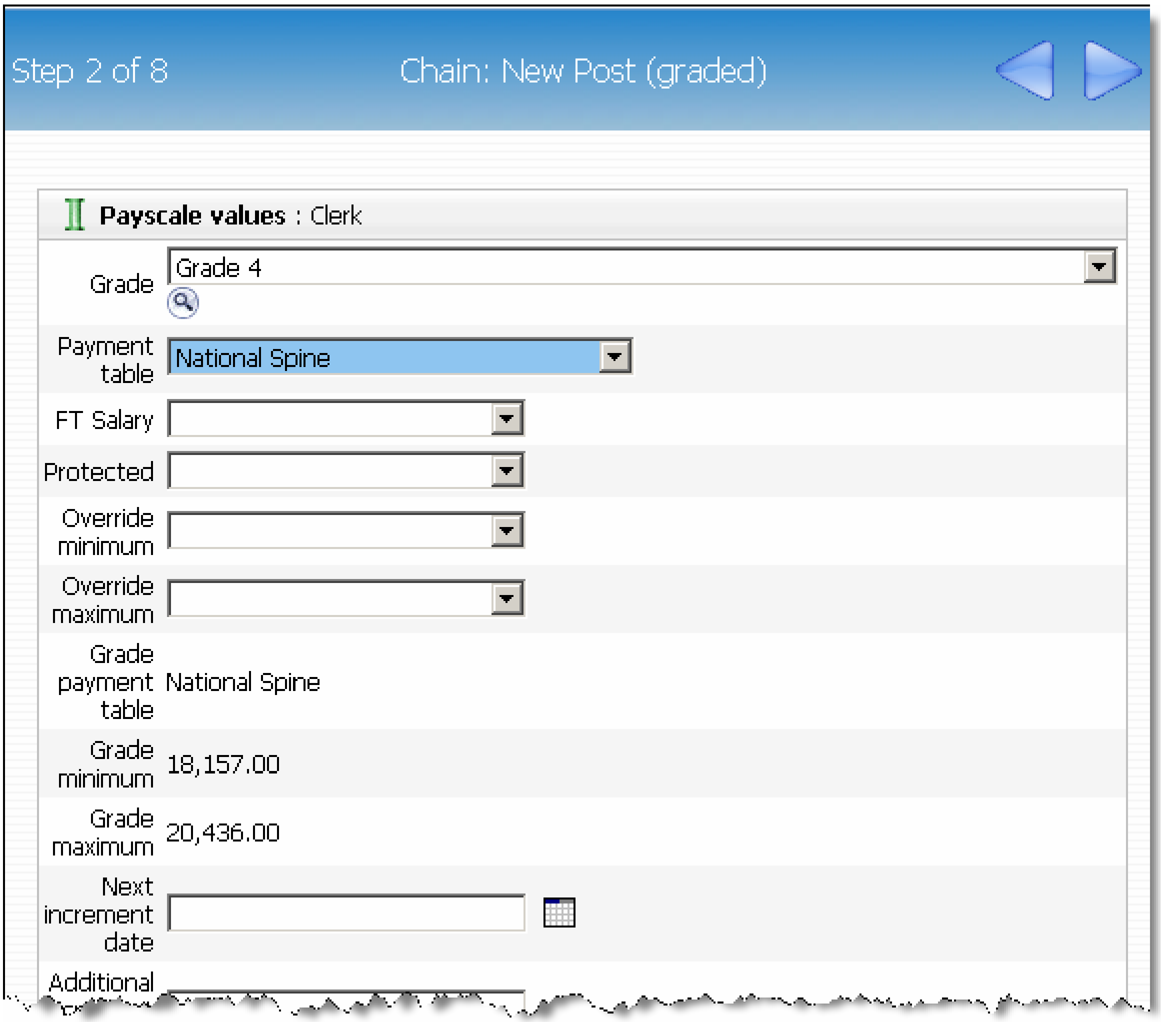
It is essential to save this first screen before you proceed to the next steps

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



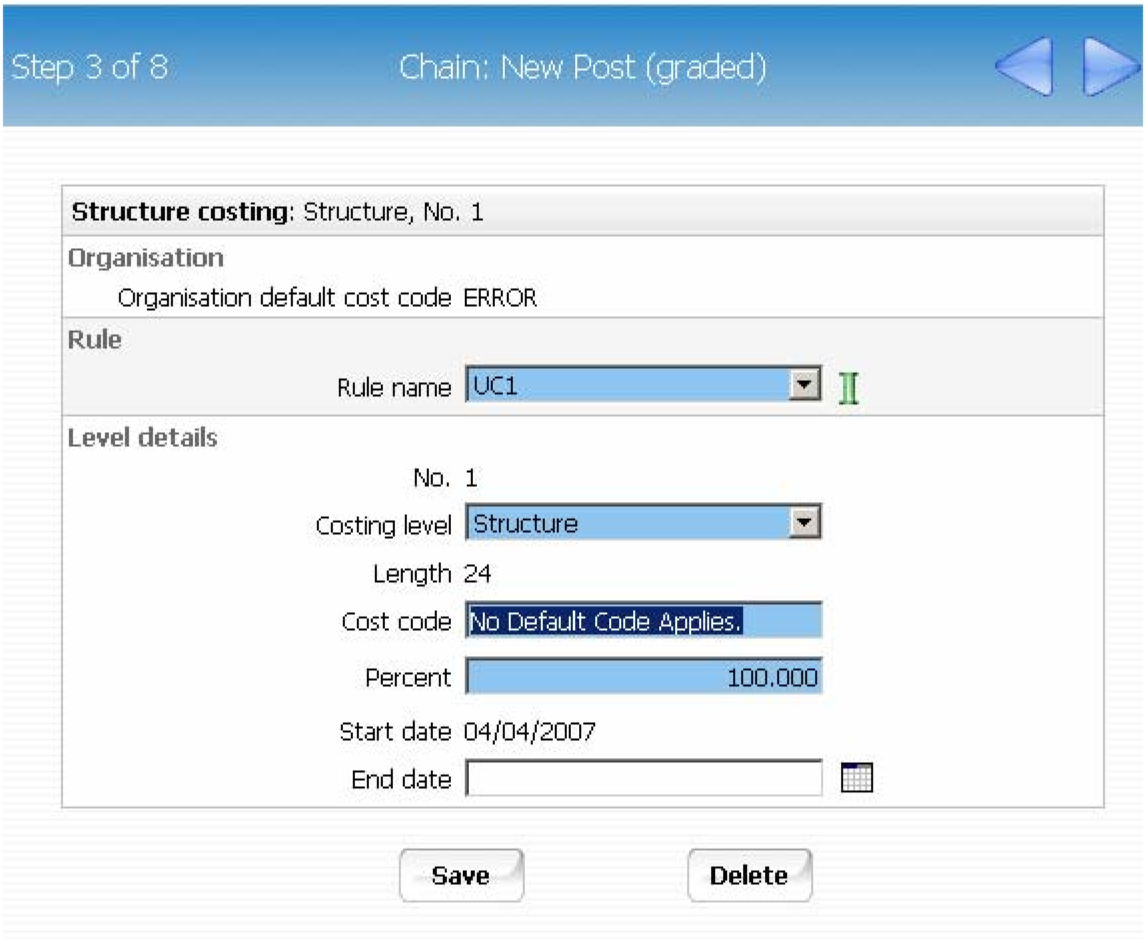
2. Choose the required grade from the drop down list
3. The payment table will automatically be filled from the above
   Note that the Grade minimum and Grade maximum will display the bottom and top service point of the chosen grade.



4. Click the **Save** 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.



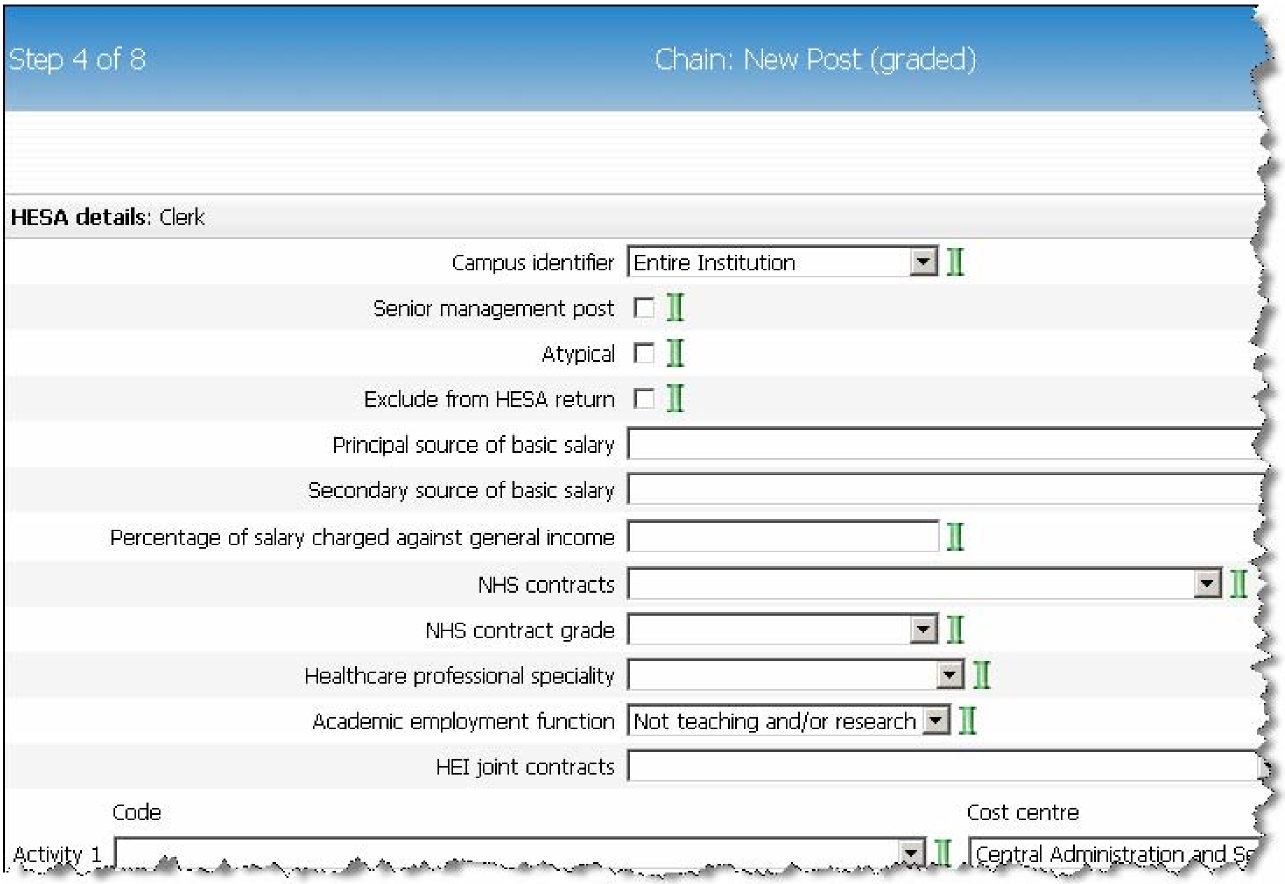
2. Replace “No default code applies” in the Cost Level field, with the relevant string in the “Cost Code” field, 100 will automatically be entered in the “Percent” field.

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.

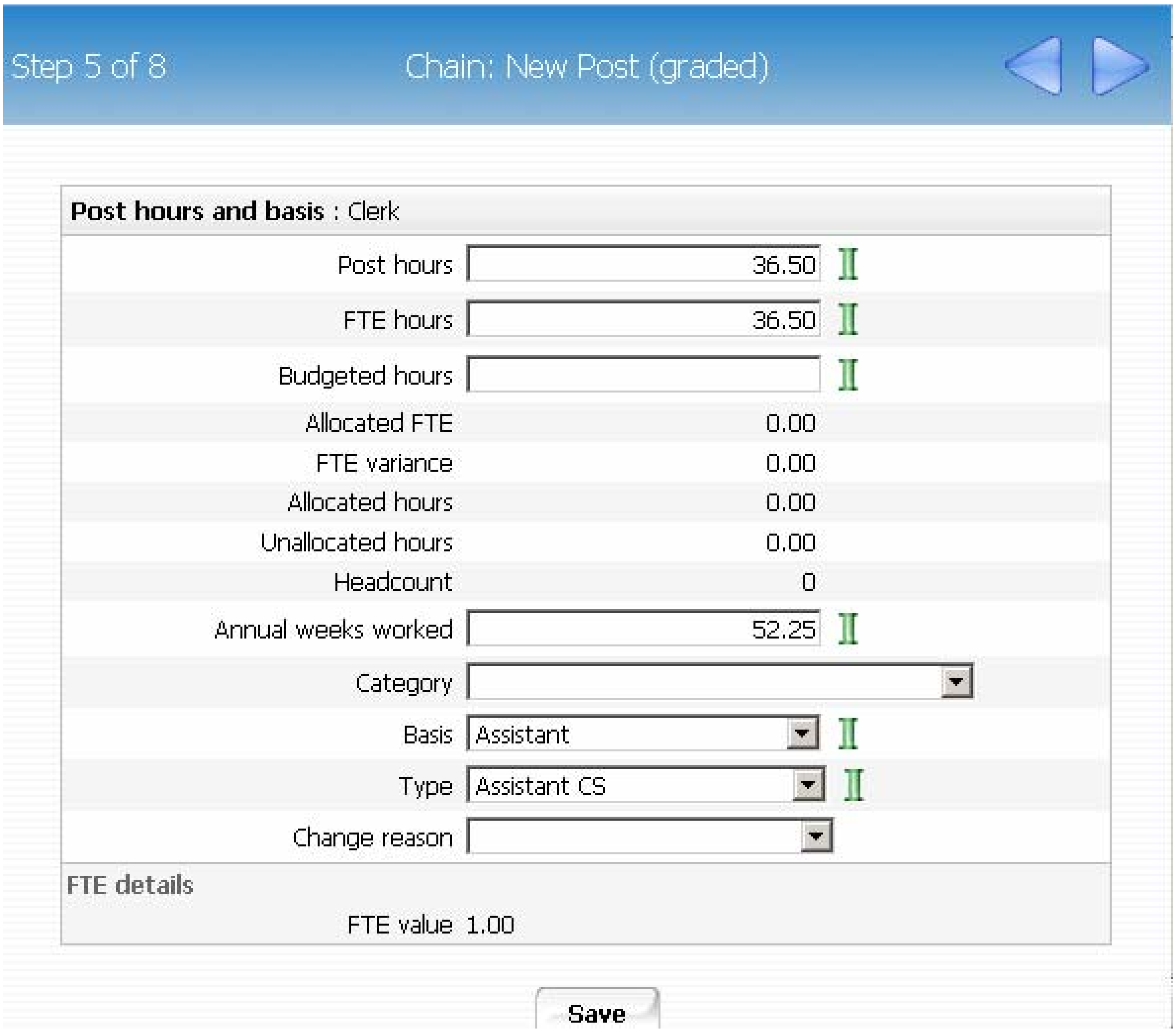


2. The Campus Identifier will be automatically inherited
3. Leave Senior Management Post blank. It will be maintained by the HESA correspondent.
4. The Atypical checkbox will be set by inheritance and any further maintenance will be done by the HESA correspondent
5. Exclude from HESA return will be set 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 Save button

4.3.4 Hours and Basis Details

1. Click on the Next Step button

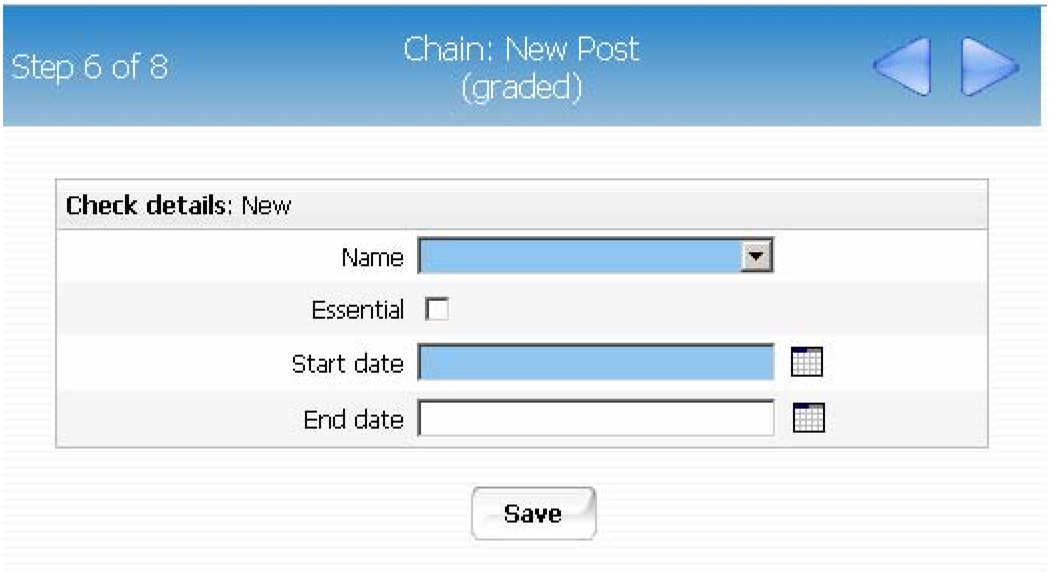


2. Check the inherited details on this form and amend details for hours, category, basis and type according to the details provided on the New Post Request Form as necessary
3. Click the 

button

4.3.5 Check Details

1. Click on the Next Step button

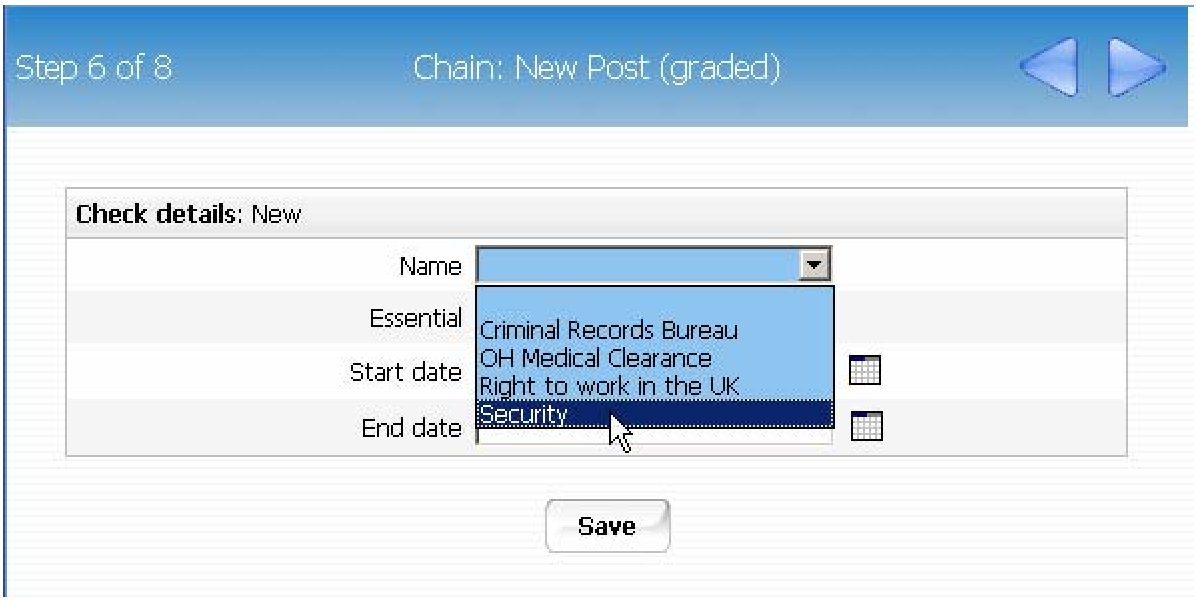


2. The New Check Details screen will be displayed.

   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.

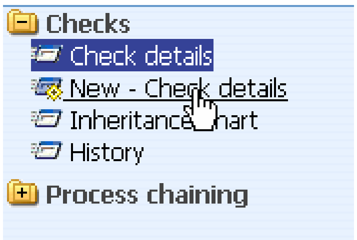
   Where a Criminal Records, OH Medical or Security check is required for the Post, click the drop down arrow to the right of the name field and select the check.



3. Tick the essential box and complete the start date.

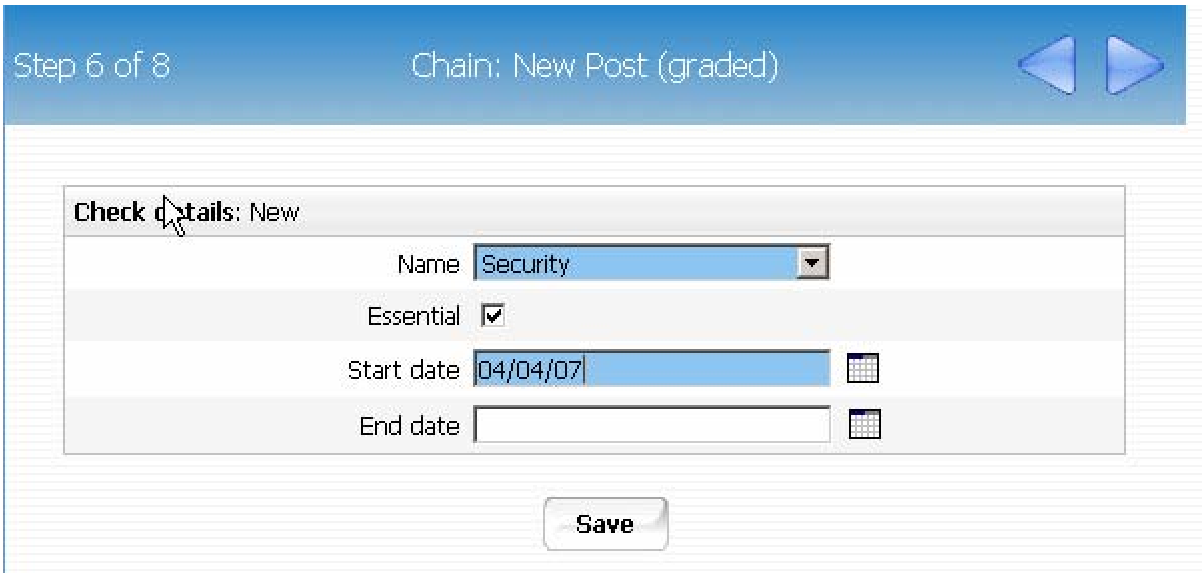
4. Click the Save button

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

7. Check the Essential box and enter the date

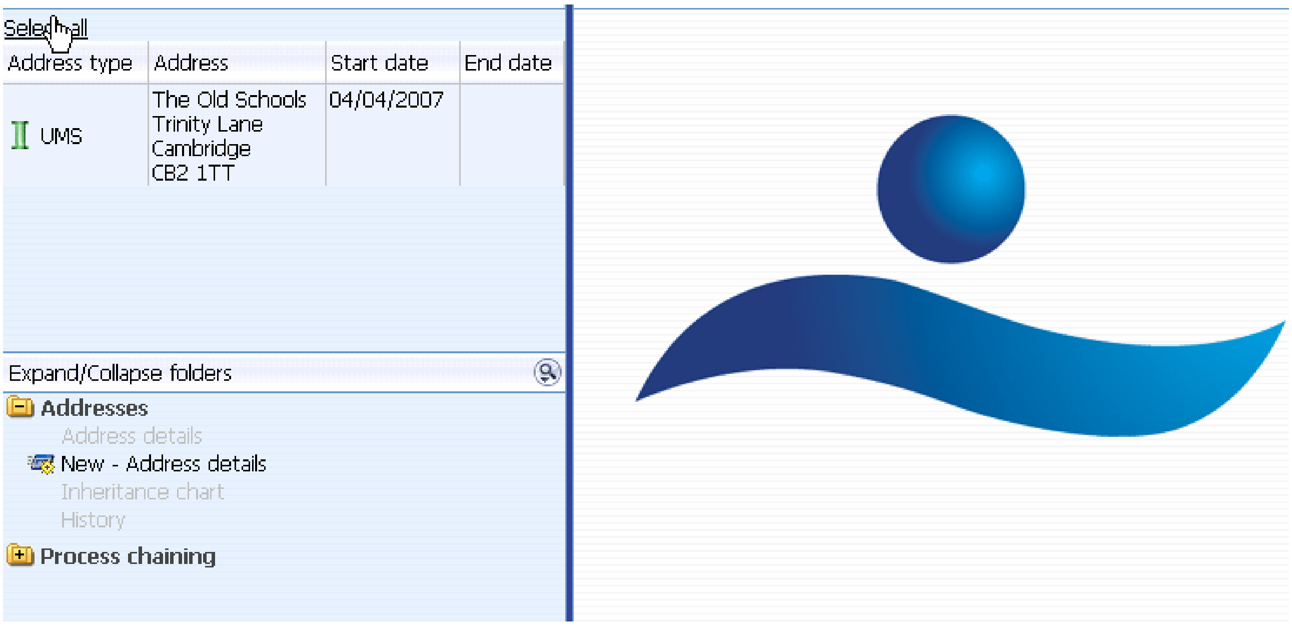


8. Click the 

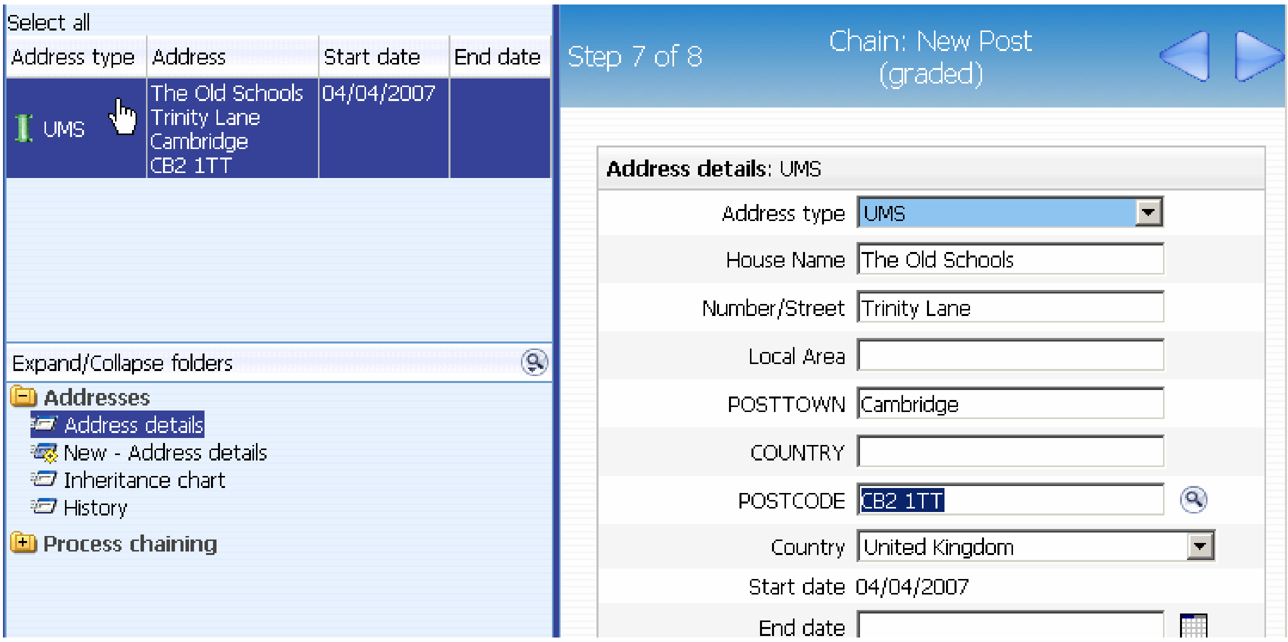
button

4.3.6 Address Details

1. Click on the Next Step button



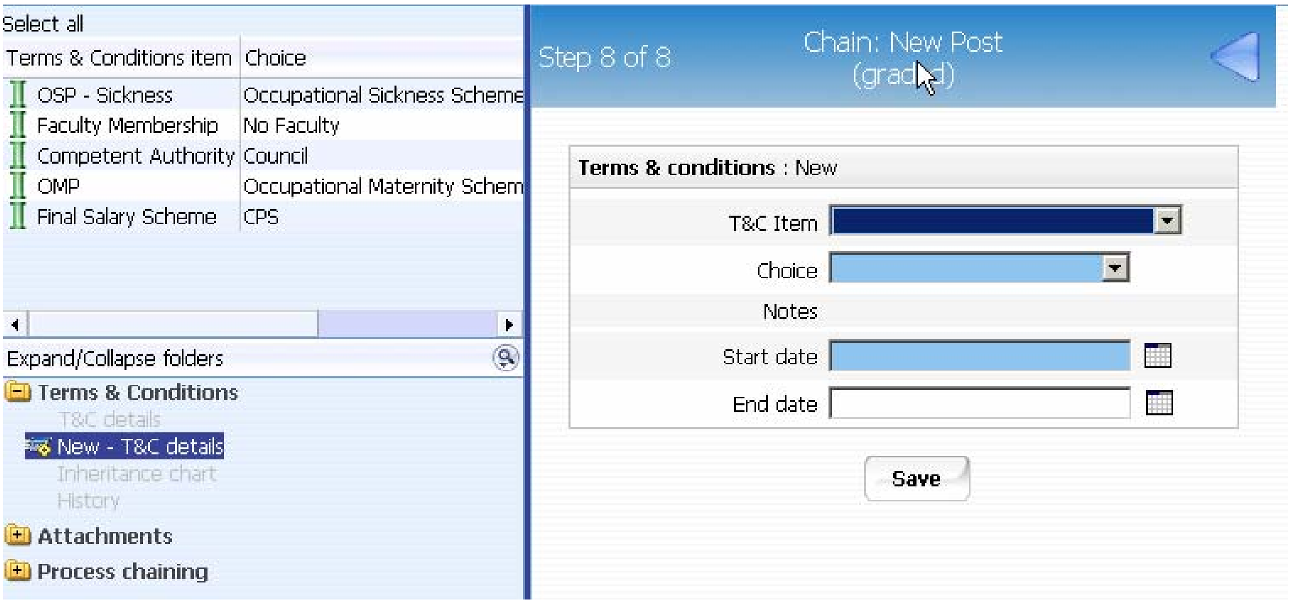
2. The current UMS address for the Post will be displayed
3. Select this address in the object pane



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.



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

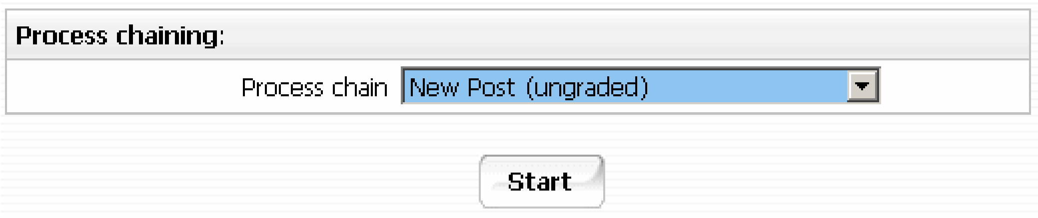
Click on the new Post in the navigation trail to leave the screen chain and view the mini explorer

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.

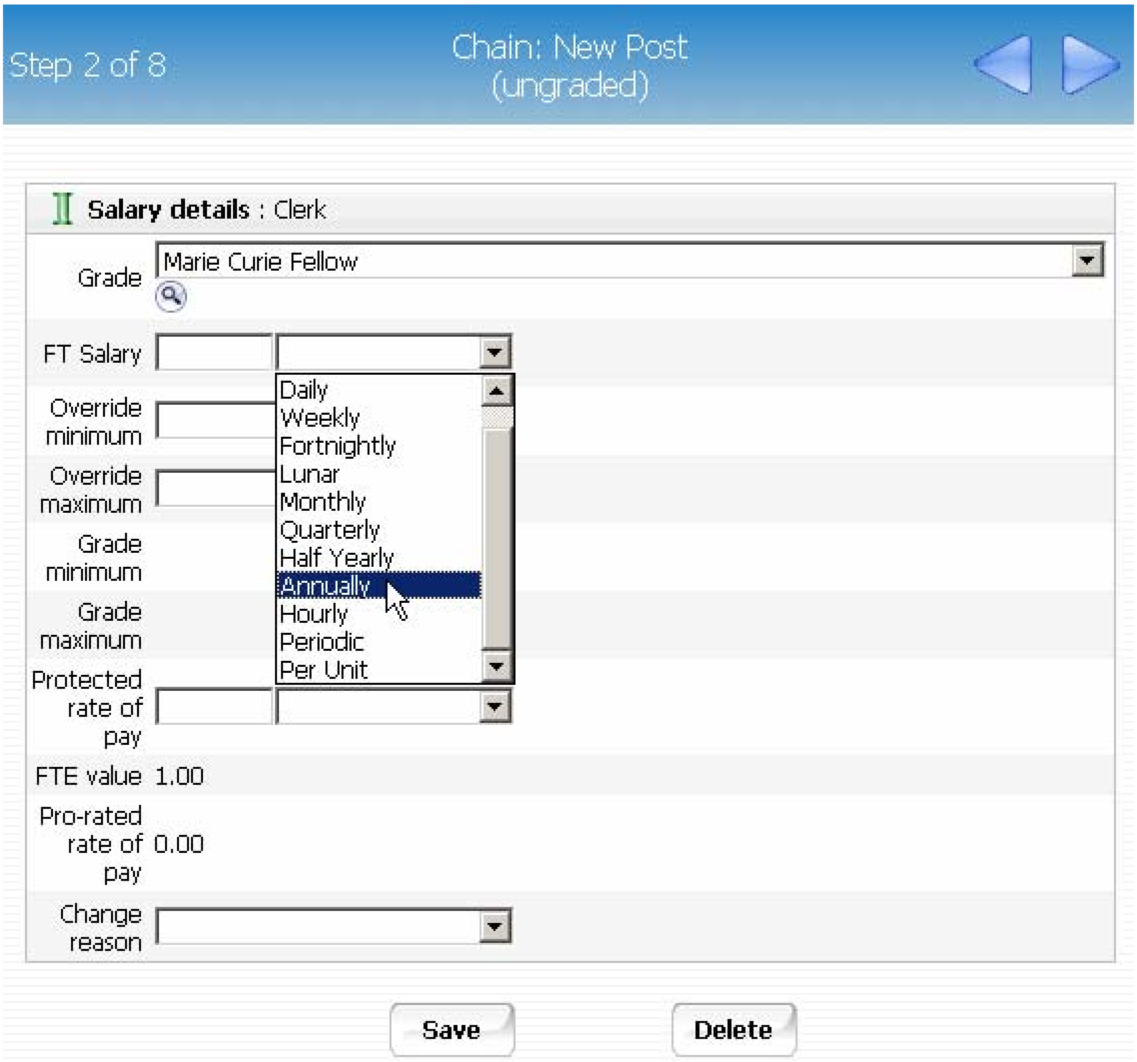
4.4.1 Starting the Process

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



4.4.2 Salary Details

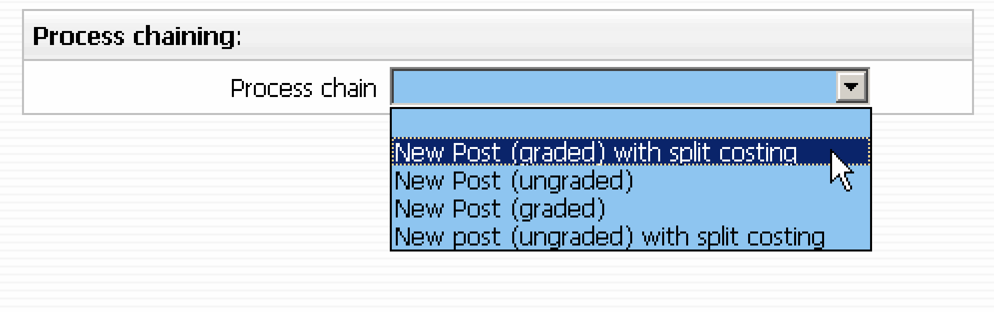
The form used to enter salary details (step 2) is Salary Details and not the Payscale Values form.



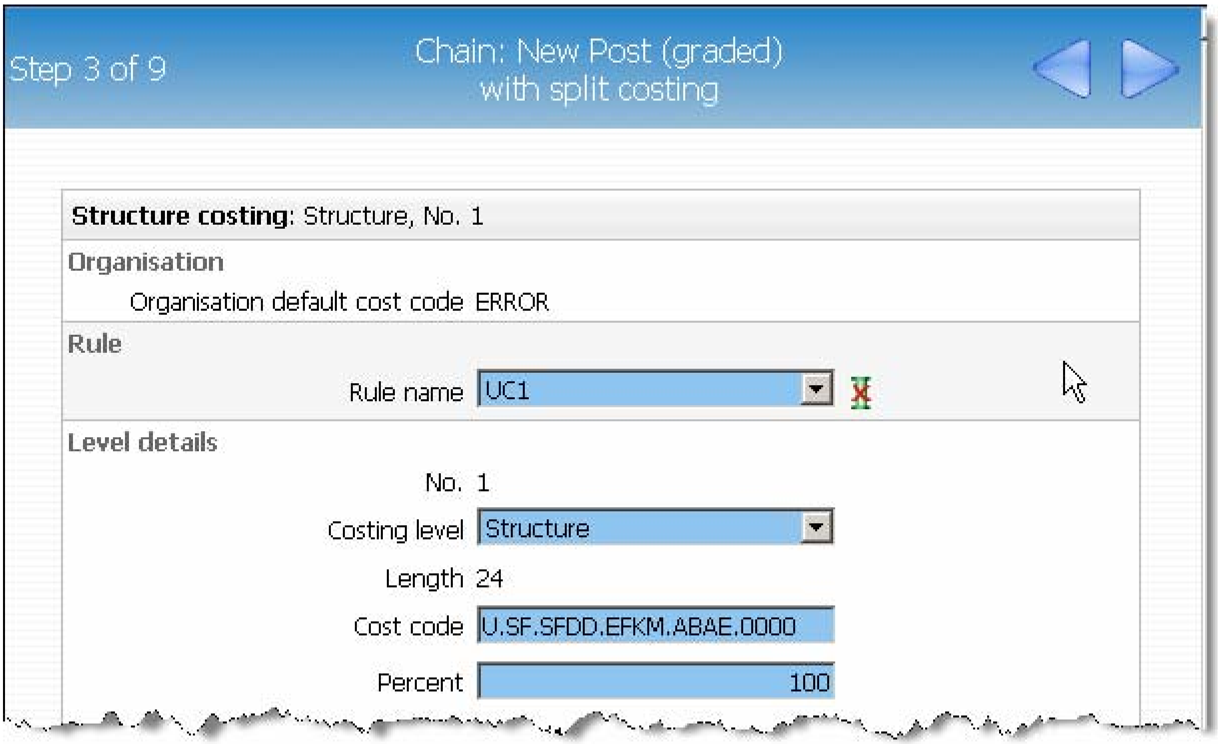
If the Post is that of a Marie Curie Fellow, Student, KTP Associate, Slade Professor of Fine Art, Proctor, Pro-Proctor or Additional Pro-Proctor select the “grade” from the top drop down box for labelling purposes. Select the frequency of salary, and save the details.

4.5 New Post with Split Costing

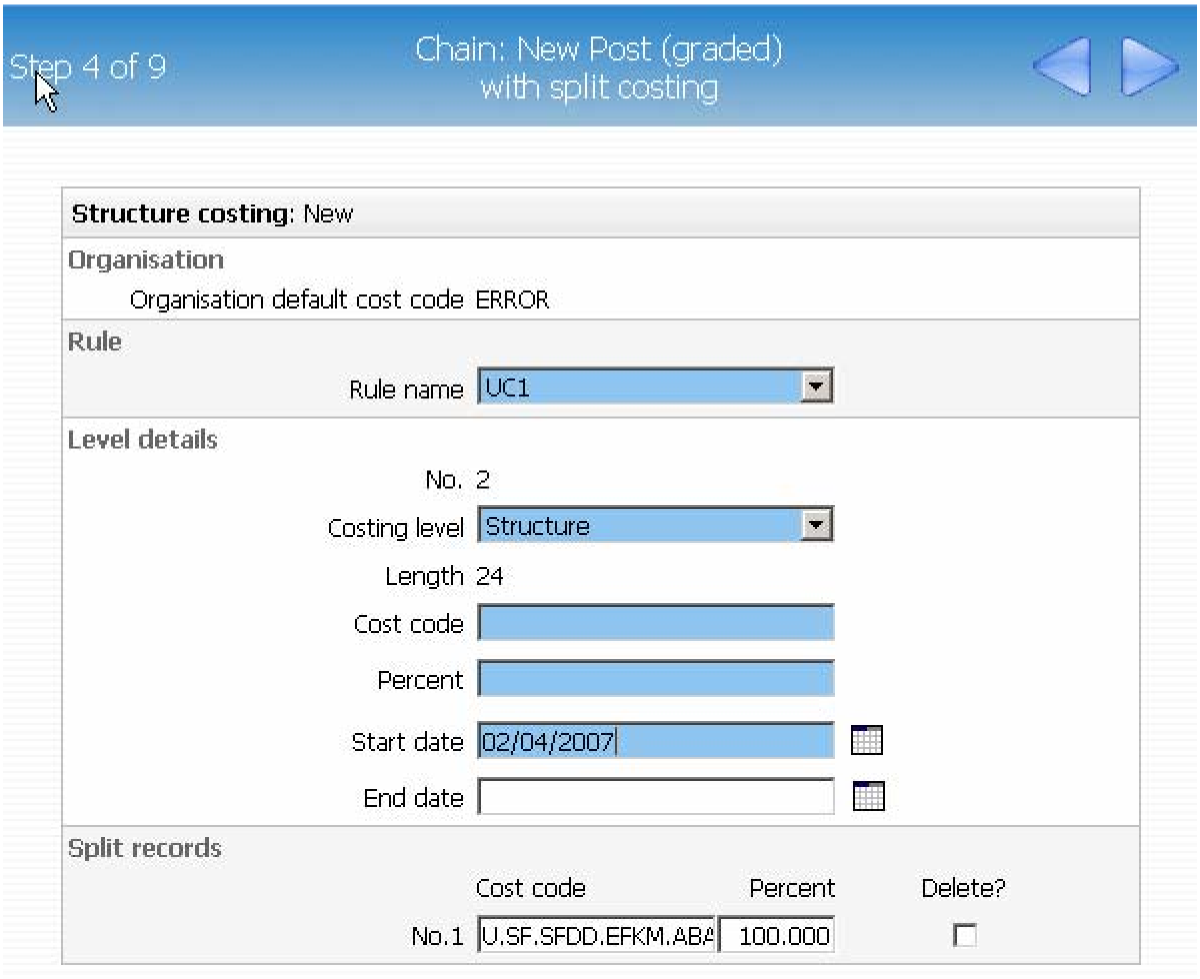
The Costing section of the new post request form can be used to determine whether a post is to be funded from more than one account code. If this is the case then select the appropriate screen chain – New Post (graded) with split costing, or New post (ungraded) with split costing. These screen chains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



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



4. 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.
5. Click the Save button
6. 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.

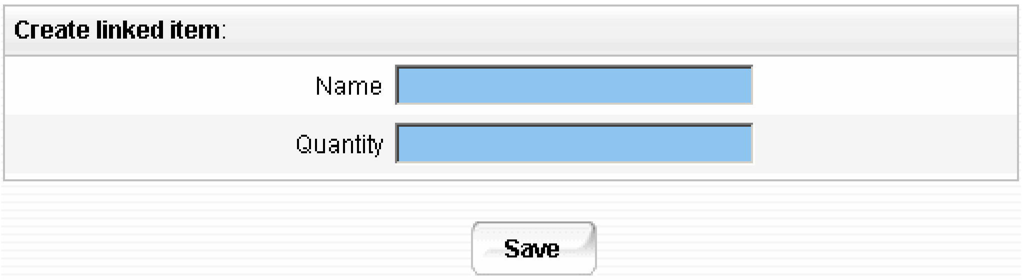
A blue position icon indicates it is occupied by a person

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

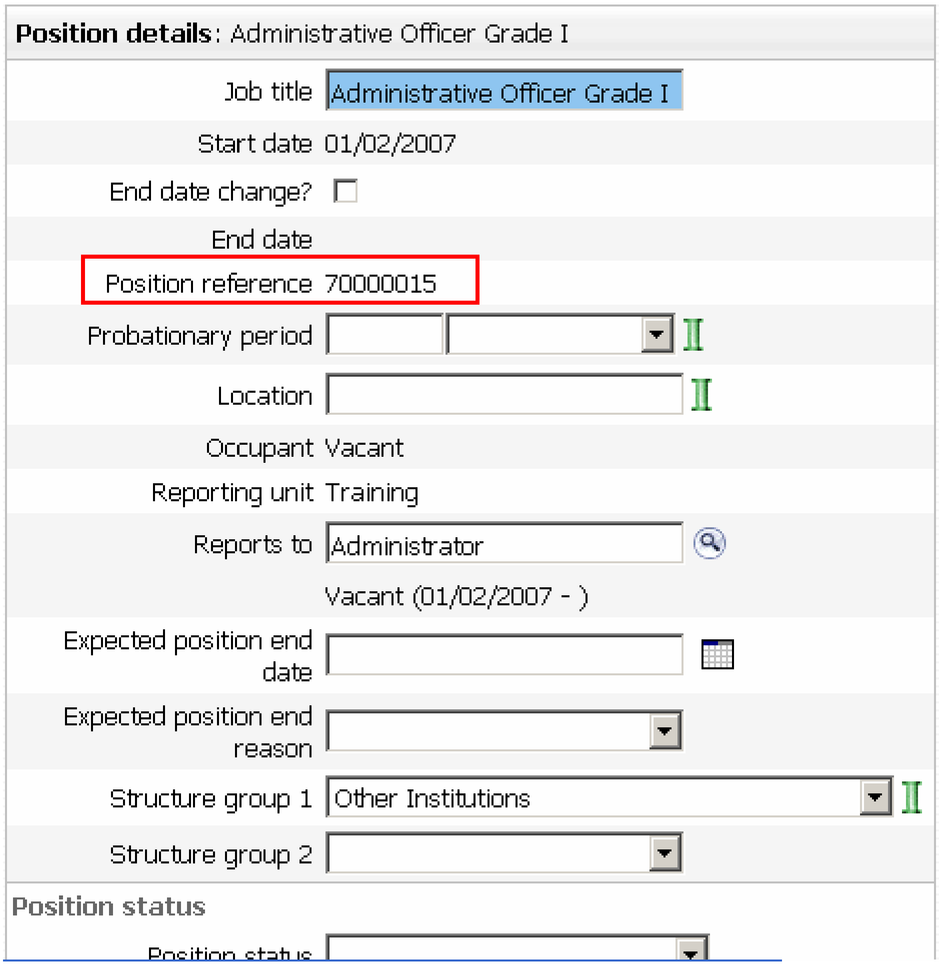


3. Enter a name for the new position.
   The Post name is the ‘formal’ title and the position name is the ‘in-house’ title.
4. Enter a quantity of 1
5. Click the Save button on the create linked item page to save your changes.
   Trent adds the new Position to the Organisation structure and the explorer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

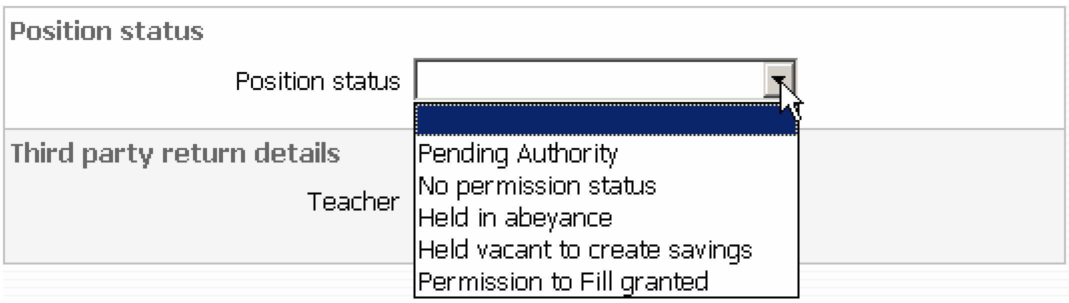
4.6.1 Position Reference number & position status

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



4. Where required enter the Position Status



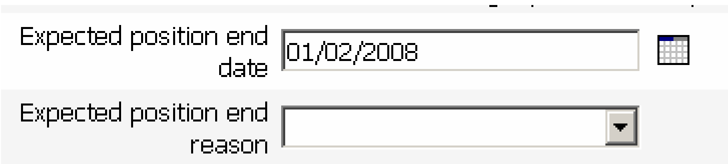
5. For a new position the position status will automatically be set to permission to fill granted. When the position status is changed to permission to fill on the strength of a letter from the Resource Management Committee section, the letter reference number ("ACD reference") is to be put in the Change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

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

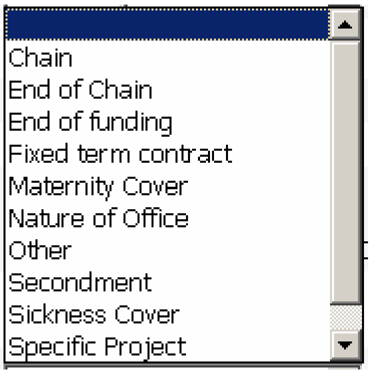
4.7 Creating a Position on a temporary basis

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



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



6. Click the  button

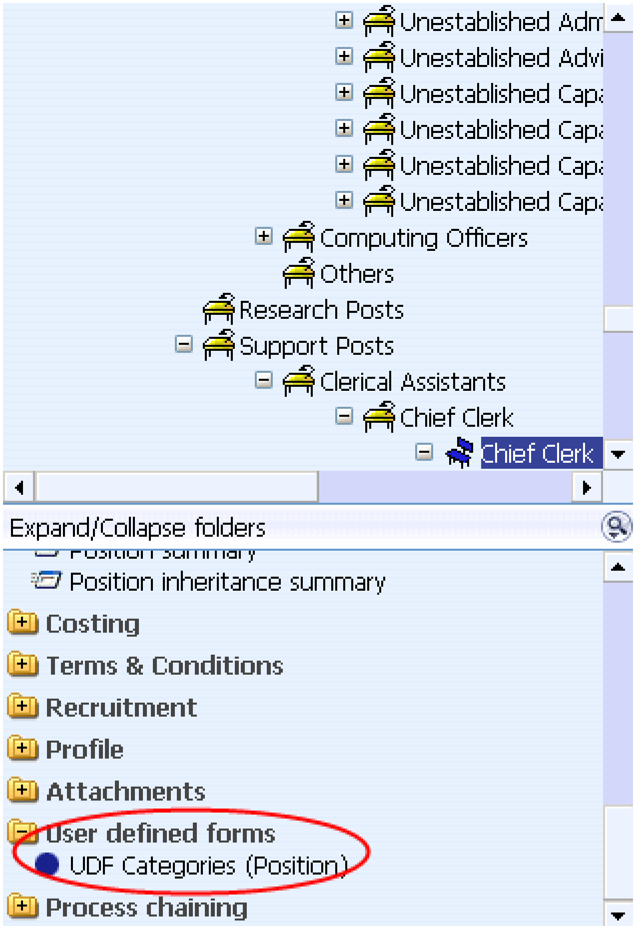
4.8 User Defined Fields

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).

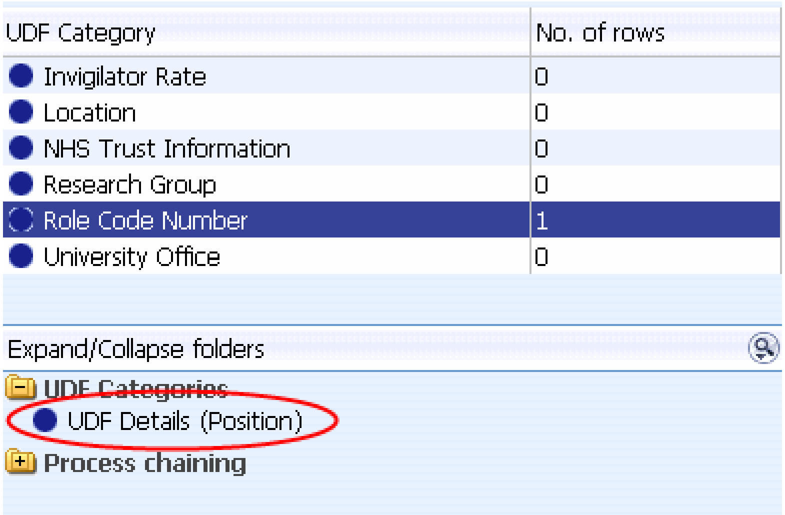
4.8.1 Role Code Number

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).

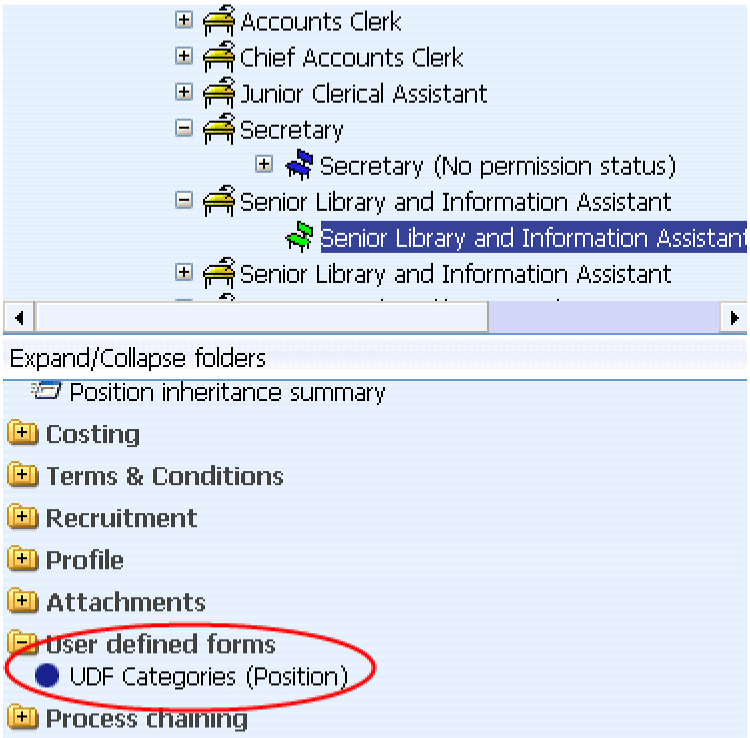


4. The Role Code reference will be displayed

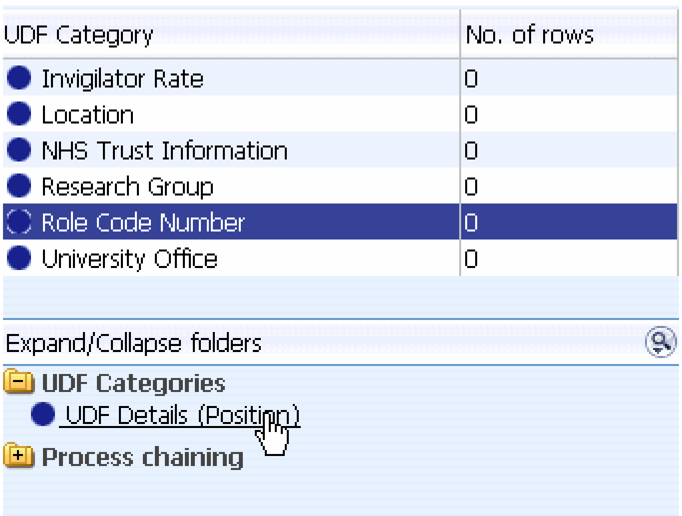
4.8.2 *Adding Role Code Number*

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)

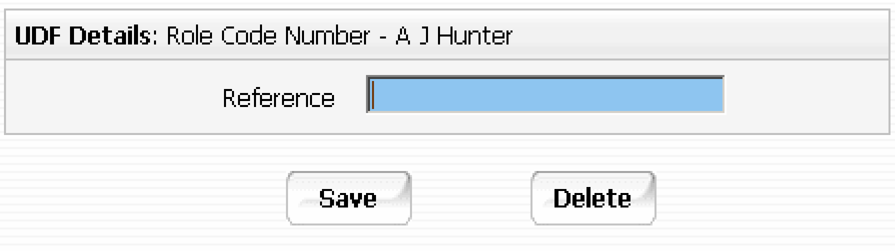


7. Select Role Code Number from the list of User Defined Fields and click on UDF Categories (Position)



8. Select New – UDF Details (Position)

9. Key in the Role Code Number

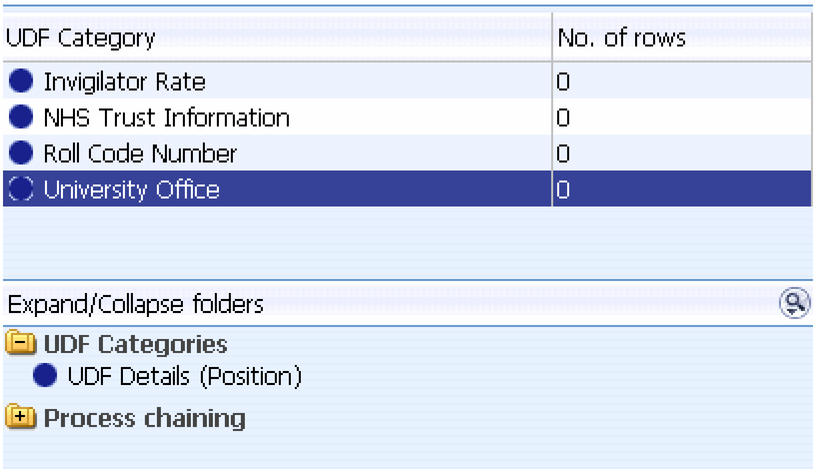


10. Click the  button

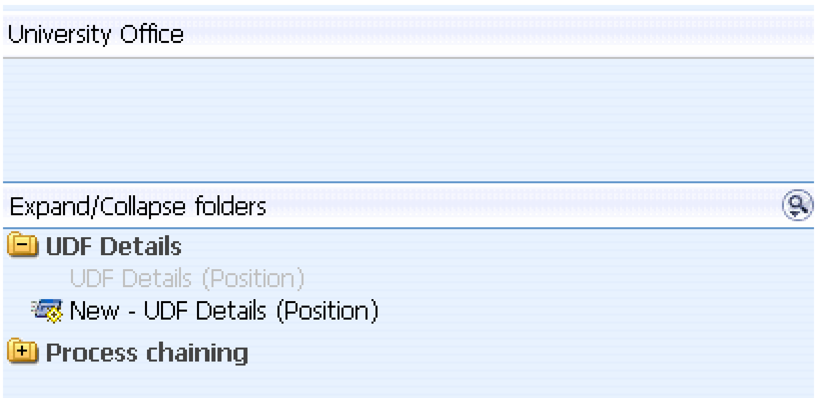
4.8.3 University Office

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.

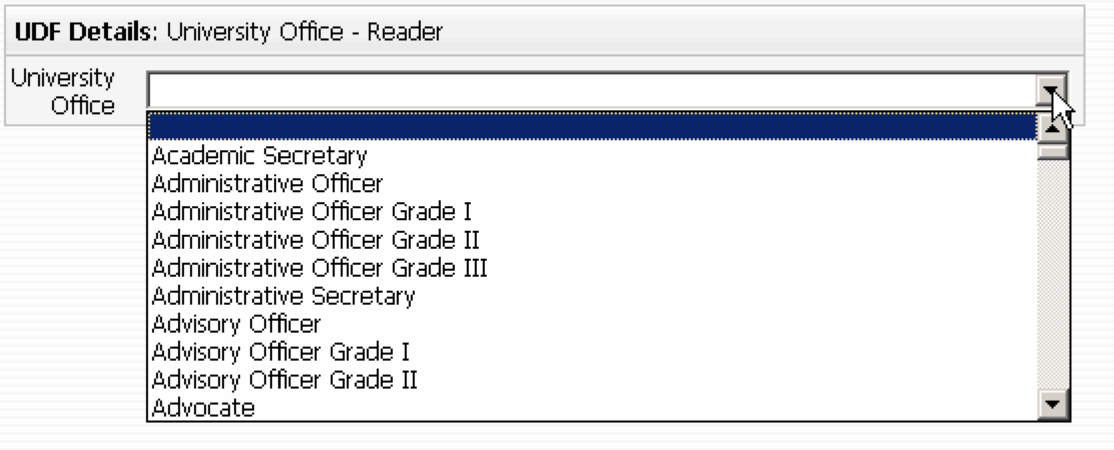
1. Select the newly created position
2. Select User defined forms and then UDF Categories (Position)
3. Select University Office from the list of User Defined Fields and click on UDF Categories (Position)



4. Select New – UDF Details (Position)



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



6. Click the Save button