UNIVERSITY OF CAMBRIDGE
The CHRIS Project

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.

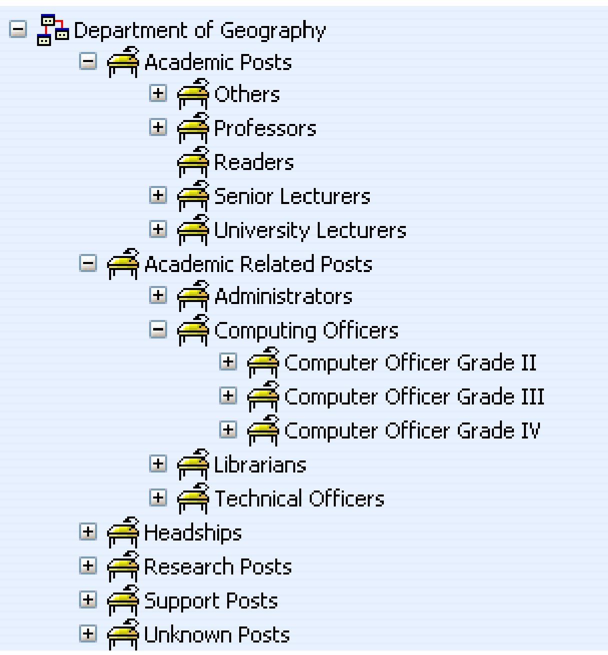
Unit

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 

. 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 item indicates hidden items below the level displayed.

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

Clicking the minus icon condenses the item again.

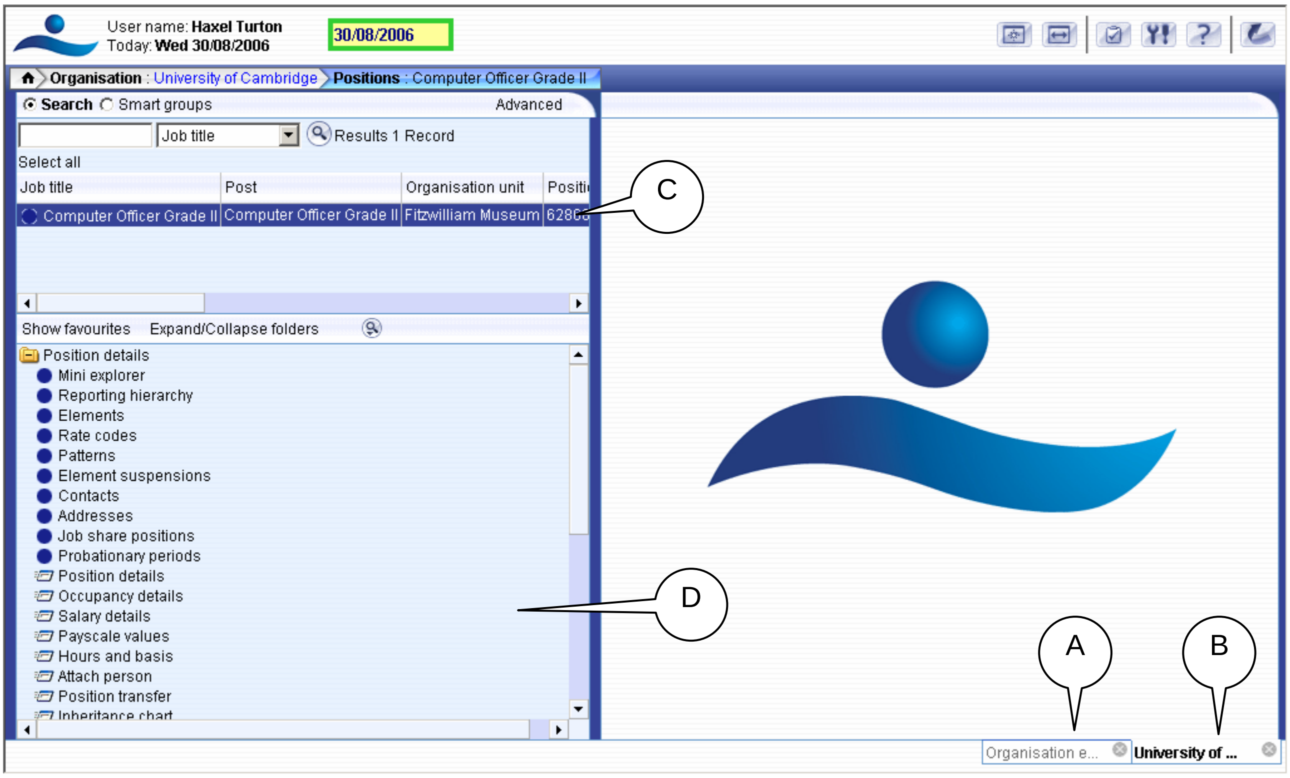
When you reach the node that you are interested in, click on it.

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.

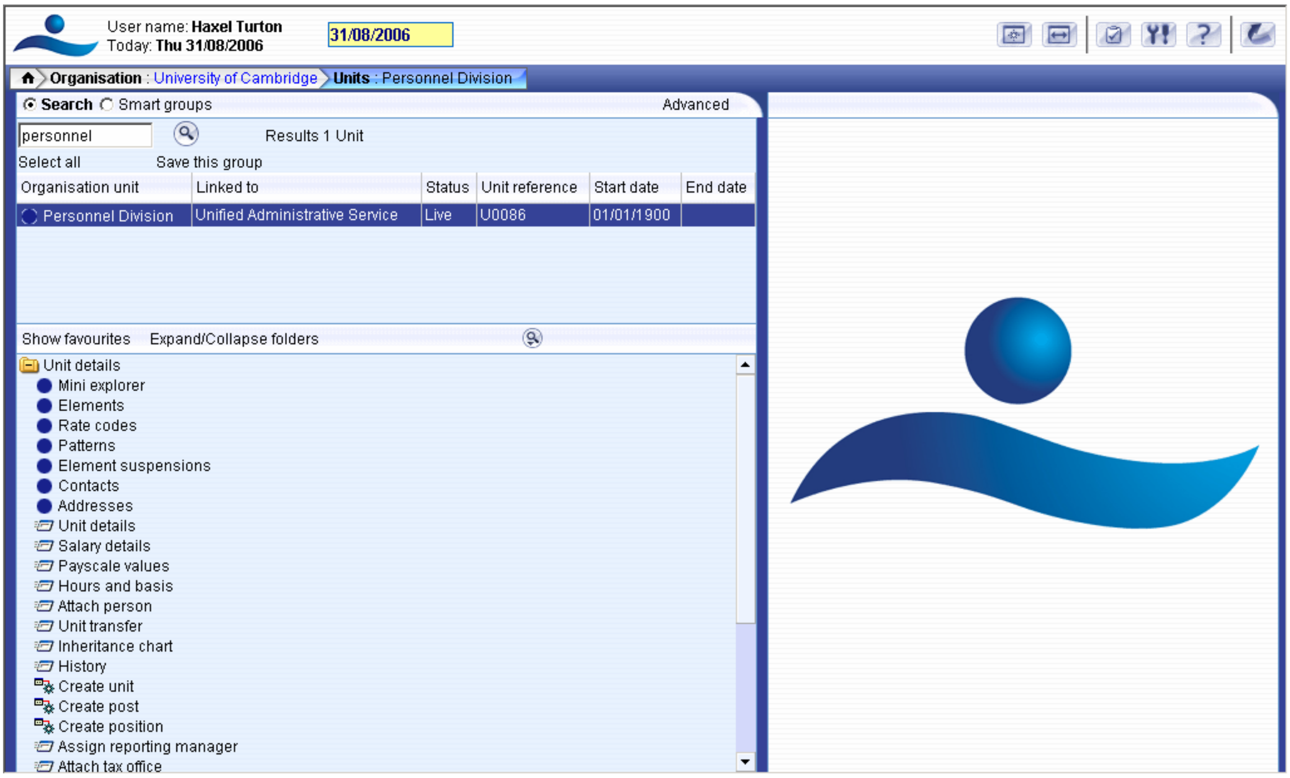
It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain items search for the unit, post or position and click the Mini explorer link in the action pane.

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.

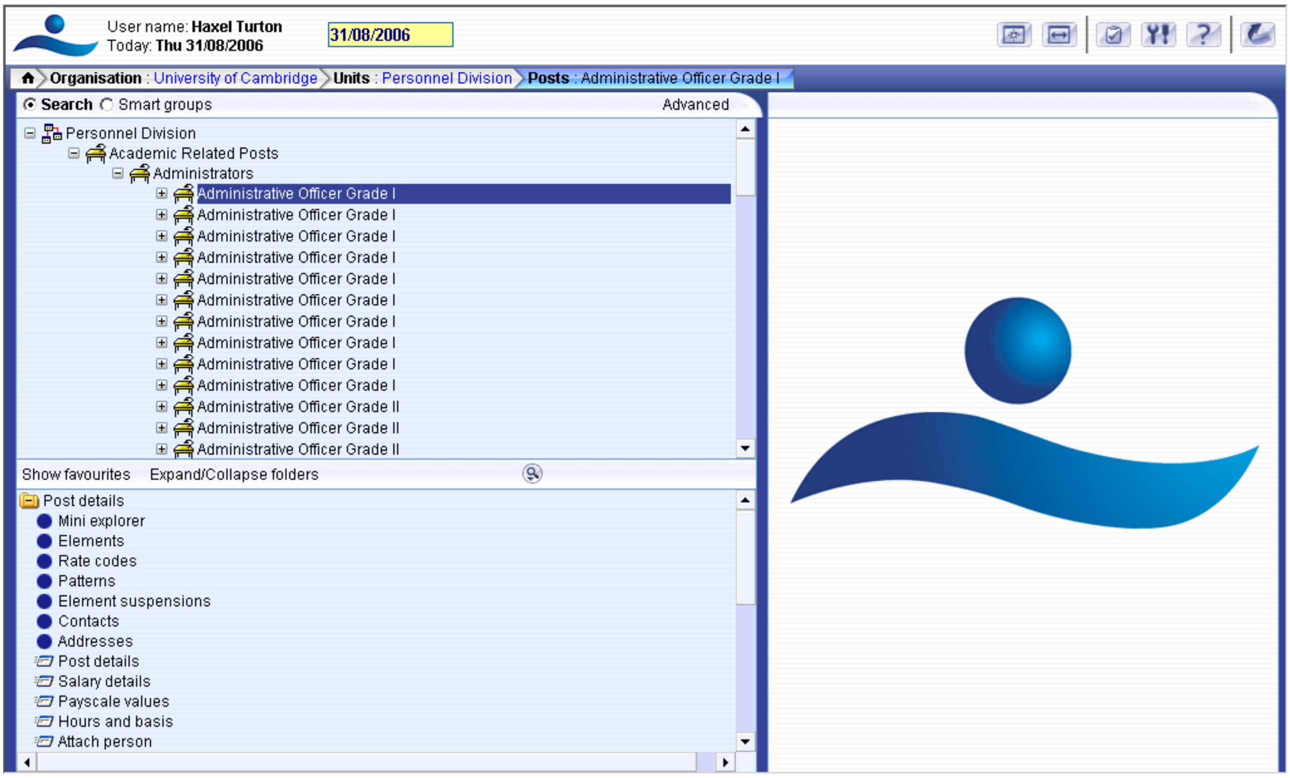
The mini explorer options are available for each of the different components that make up the structure (Units, Posts and Positions), and can be accessed in the relevant folder.



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 mini explorer can also be used to access details of a post, position or person (contract). 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 Save in the display pane to save the changes.

3 Overview of the new appointment process

All new starters within the University, will be entered on to the CHRIS system and attached to a position by staff within Central Personnel based upon the details provided on the New Appointment Request Form - CHRIS/10, New Casual Appointment - CHRIS/11, New Research Appointment - CHRIS/12 (or for Students, New Studentship Form - CHRIS/30). This form rationalises the PD1, PD2 and PD1a forms and will be used for all staff groups. It will be available from the website for downloading (and potentially as an E form) for completion by the institutions.

Another new form will also be introduced: a 'Certificate of Acceptance' - CHRIS/20. This form will be authorised by the institution to authenticate the arrival of a new starter and will be used as a trigger to attach the individual to a payroll. This is required because as Trent is an integrated HR/Payroll system it is very difficult to remove staff from the payroll if they do not appear for work.

The 'Certificate of Acceptance' form will also have a separate tear-off section that will allow the employee to submit sensitive personal information to Central Personnel for processing and thus replacing the existing PD16 form.

Exceptions

The Payroll Team will be responsible for setting up Pensioners within a separate Pensioners Organisation (not visible to an East Room user). TES Temps will initially be set up by the Payroll Team and later on handed over to TES Team. The Payroll team will remain responsible for setting up on CHRIS individuals from external organisations. These will include:

- Cambridge Enterprise
- University Farm
- Various Trusts

4 Process Chaining Principles

A new person can be added by making use of a process chain. 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.

4.1 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.

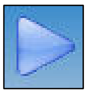
4.2 The Process Chain Bar

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.

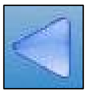
Once the first step within a process chain has been completed, you can add other details as required.

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

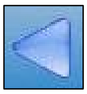
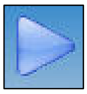
To move onto the next step, click on the Next Step button in the top right corner of the form.



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



4.2.1 Multiple Entries

To make multiple entries within a step of the screen chain, for example to enter two different address types, save the first details entered, use the previous step button  to move backwards, then use the next step button  to return to the screen where you wish to make an additional entry. You will then be able to select from the complete list in any drop down box and complete as normal.

4.3 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 to 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.

4.4 Chain process E-mail reminders

Some process chains are also designed to send an email task which will be sent directly to your email inbox. In the New Starter process chain, if you start the chain and then stop the process an email reminder will be sent.

Trent workflow reminder - late task for Mr Bart Simpson.

het27@admin.cam.ac.uk

To: Hazel Turton

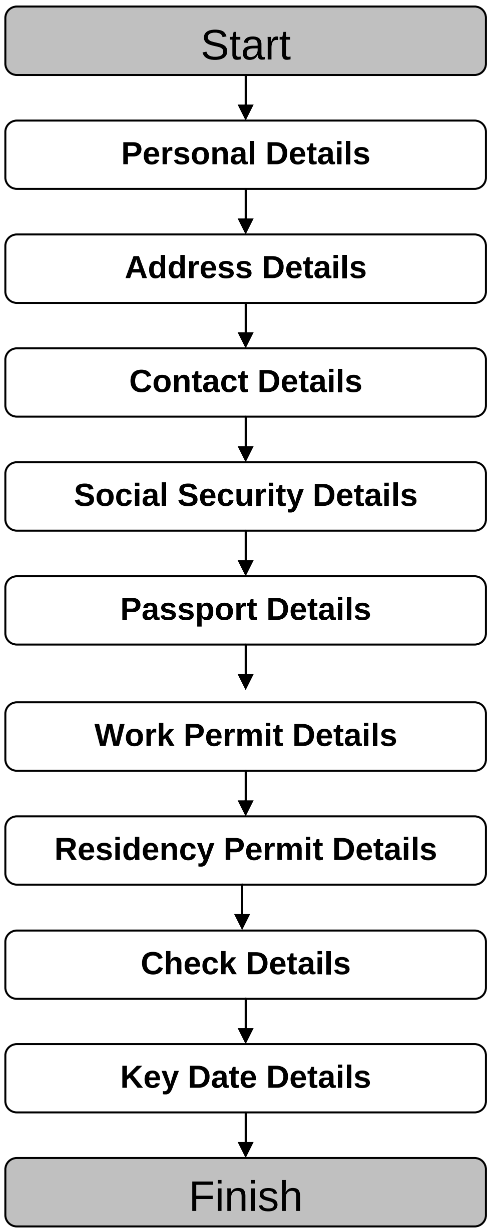
```
The following Trent task was due for completion by 20/03/2007 14:11:44.
It is now late.

Task:    Contact details
Form:    Contact details
For:     Mr Bart Simpson

Completion due date:   20/03/2007 14:11:44
Priority:              1
```

To continue the task Click on the To Do List button within the Control Bar in Trent which will open the To Do List Pane.

5 New Starter Process

5.1 Process Overview

The new starter 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.



5.2 Starting the New Person Chain

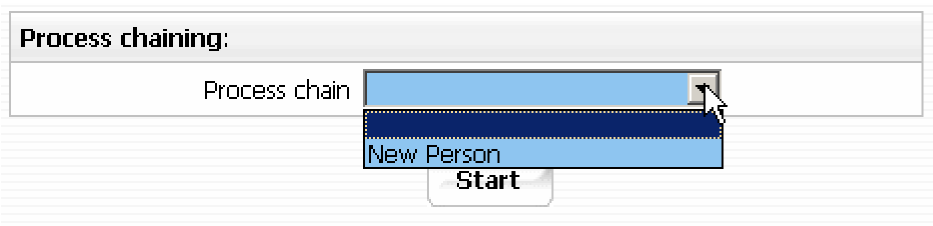
Navigate: Organisation > People > Process Chaining > Process Chaining

1. Select the University of Cambridge organisation
2. Select the People menu item from the Action Pane
3. Check whether the person already exists

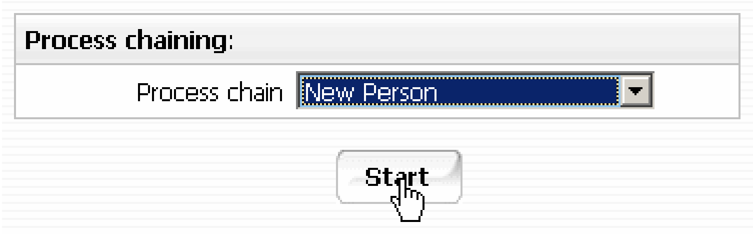
   Enter the surname of the new person to be created and click on
   If there are already people on Trent with this surname they will be listed by Unit and Job title. Identify using initials, date of birth, NI number, and if they exist abort adding and check the details provided agree with the details already recorded.
   If the person is not found by surname, perform another search by NI number to establish they are not already added.

   If the person does not already exist on the system, continue to step 4.
4. Select the Process Chaining menu from the Action pane

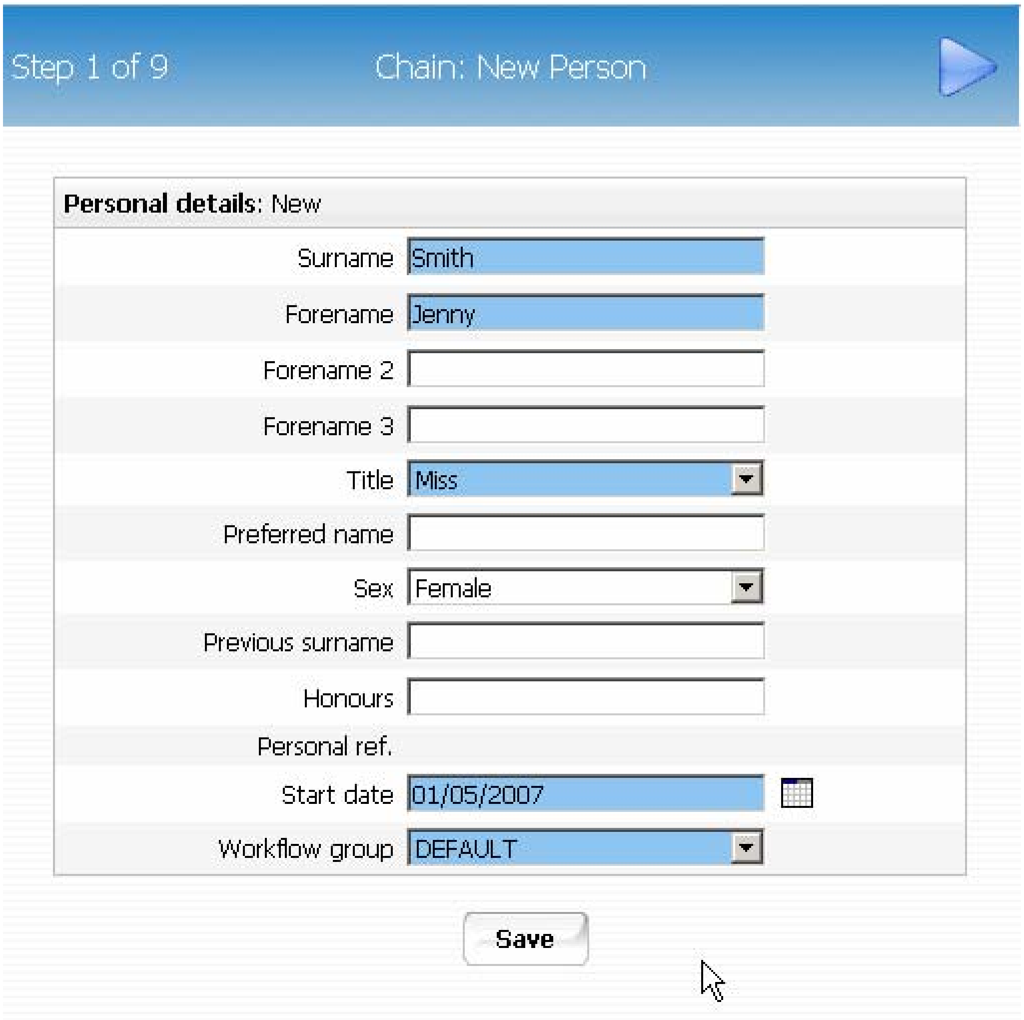
5. Select the Process Chaining option and type in the required date in the effective date field.
6. The resulting form will allow you to select the required Process Chain.



7. Select the New person chain and click on the Start button to commence the process.

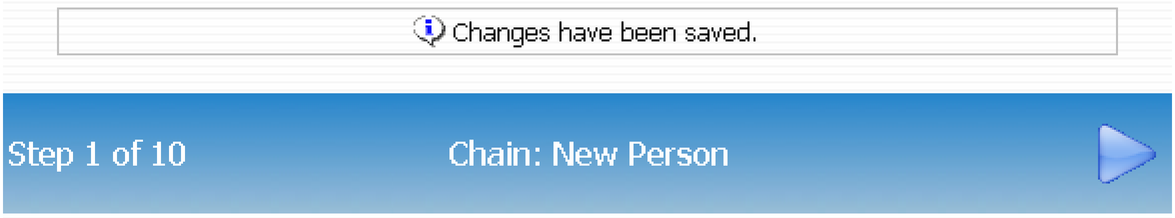


8. The first step will then be presented (Personal Details).



9. Key in the surname, first name, first name 2, first name 3 if applicable.
10. Click the drop down list arrow and select a title
11. Enter preferred name if applicable, sex, previous name, honours and organisation start date. Leave workflow group set to Default
12. Click the 

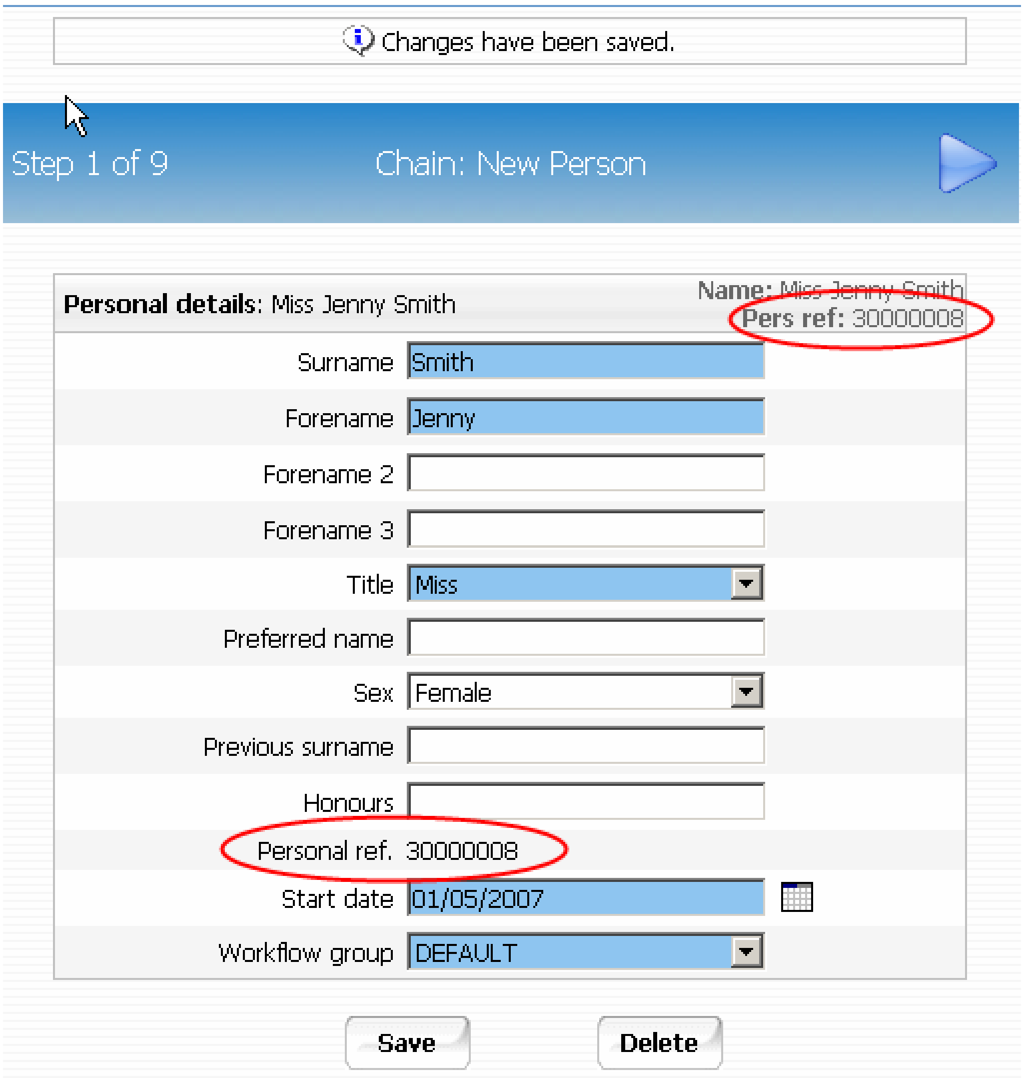
button.
A banner confirming the save will appear at the top of the screen



The record will be saved and the new person's details will be displayed in the object pane.

5.2.1 Personal Reference Numbers

A personal reference number is automatically generated by Trent when a new person record is created. To enable you to easily identify this person to input person related information it is advised that you make a note of the personal reference number once you have added them. The last section of the New Appointment Request Form CHRIS/10 provides a 'Personnel use only' place to record this.



6 Additional Personal Information

6.1 Address Details

Address details can be obtained from the New Appointment Request Form, section C – personal details.

1. Click on the Next Step button, this will present you with the form used to enter an employees address.

2. Home/Personal address is displayed as default and this address is supplied on the New Appointment Request Form CHRIS/10, section C, personal details.
   Correspondence and term time address currently appear in the drop down list but these will disappear post Go Live
   Where only one address is entered the mailing address check box will automatically be checked. However, the UMS address held against position will be used.

3. Key in address details. The COUNTRY field only needs to be filled for an address that is not in the United Kingdom. (Note this field *is* meant to be Country and not County. The Post Office guidelines for writing addresses are that a post town with a postcode is all that is necessary as the County is reflected in the postcode). The Country field will automatically default to United Kingdom.

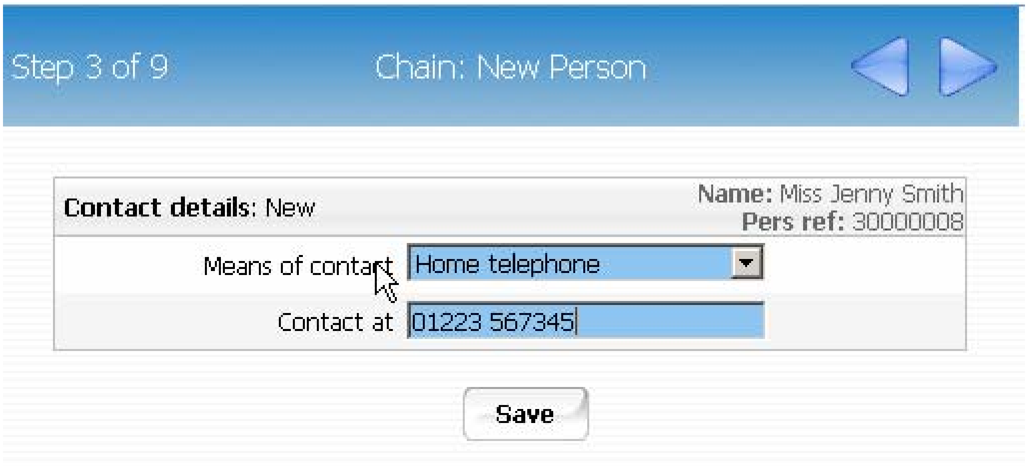
4. Click the 

button

6.2 Contact Details

Contact details can be obtained from the New Appointment Request Form CHRIS/10 page 2, section C – Personal Details. Question 18 requests home phone number.

1. Click on the Next Step button
2. Click the drop down arrow and select the appropriate contact type



3. Key in the details of telephone number
4. Click the Save button

6.3 Social Security Details

The social security details menu is used to record a persons' National Insurance number. This can be obtained from the New Appointment Request Form CHRIS/10, section C – personal details, question 16 or question 5 of the Certificate of Acceptance CHRIS/20

Where an employee has applied for a National Insurance number this step can be left uncompleted and the details will need to be completed when they are issued with their number.

1. Click on the Next Step button
2. Click the drop down list arrow and select UK legislation.

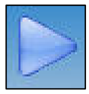
3. Input the National Insurance Number
4. Click the 

button

6.4 Passport Details

1. Click on the Next Step button

2. Key in Passport number, issue date, expiry date and issuing country.

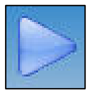
   (If no work permit details are required click on the Next Step button  to move to Step 6).

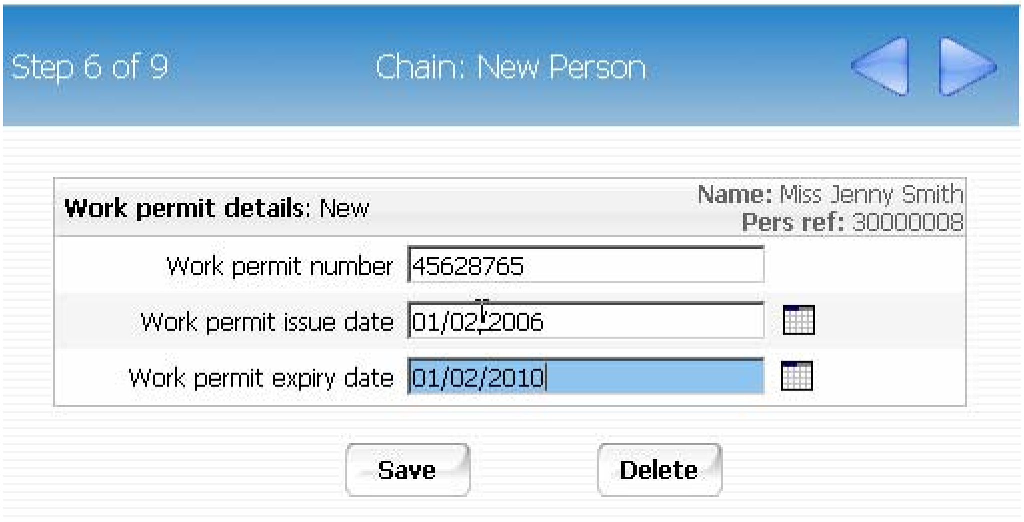
3. Click the  button.

6.5 Work Permit Details

Where an employee has a work permit, details can be entered using this option

1. Click on the Next Step button

2. If no work permit details are required click on the Next Step button  to move to Step 7.



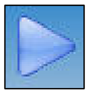
3. Whether the new person requires a work permit is recorded in the personal details section of the New Appointment Request Form CHRIS/10 or CHRIS/11 or CHRIS/12. Enter the work permit number, issue date and expiry date.

4. Click the  button.

6.6 Residency Permit Details

Where an employee has a residency permit, details can be entered using this form

1. Click on the Next Step button

2. If no residency permit details are required click on the Next Step button  to move to Step 8.

3. Where residency permit details are provided enter the residency permit number, issue date and expiry date

4. Click the 

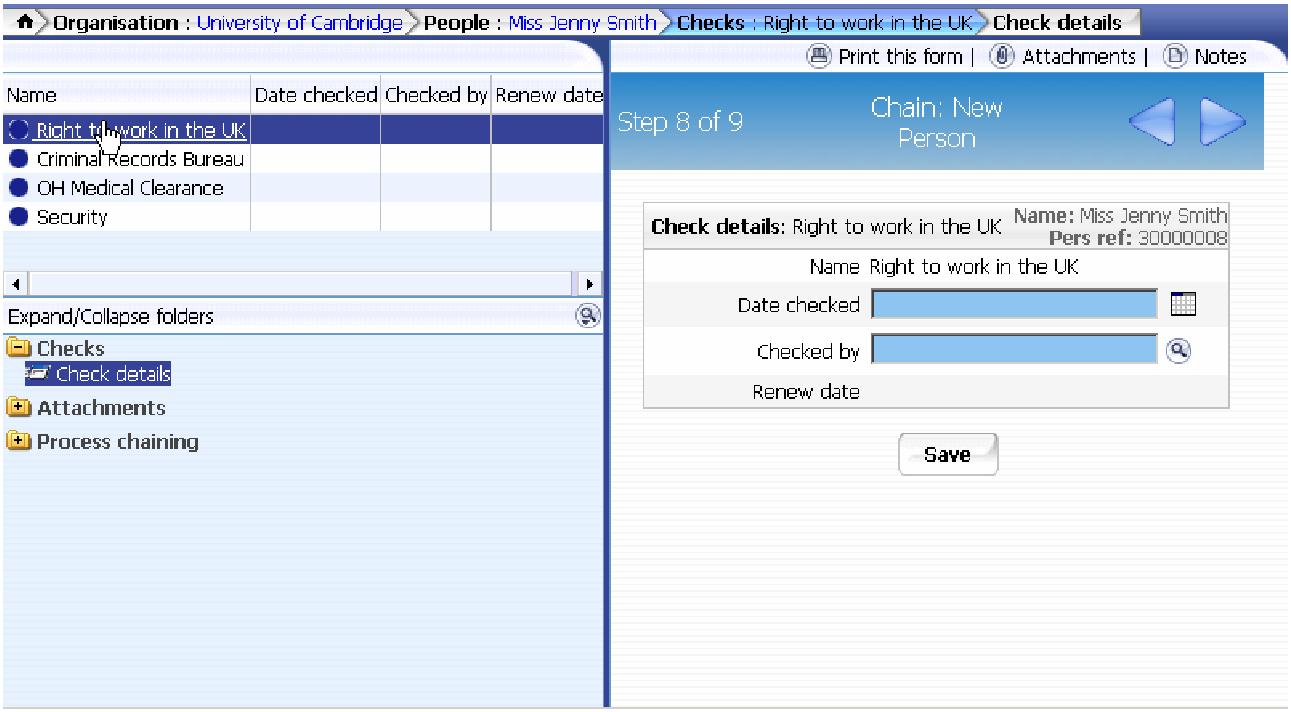
button.

6.7 Check Details

The University has a legal obligation to ensure that all employees have a valid entitlement to work and reside in the UK, regardless of nationality. All appointments require a right to work check and the details of this check should be recorded in employee checks.

Where an appointment also requires the occupant to have health, criminal records or security checks these details can also be recorded.

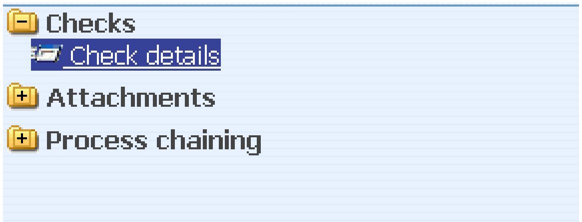
1. Click on the Next Step button
2. Select Right to Work from the check types displayed and then click on Check Details form in the Action Pane

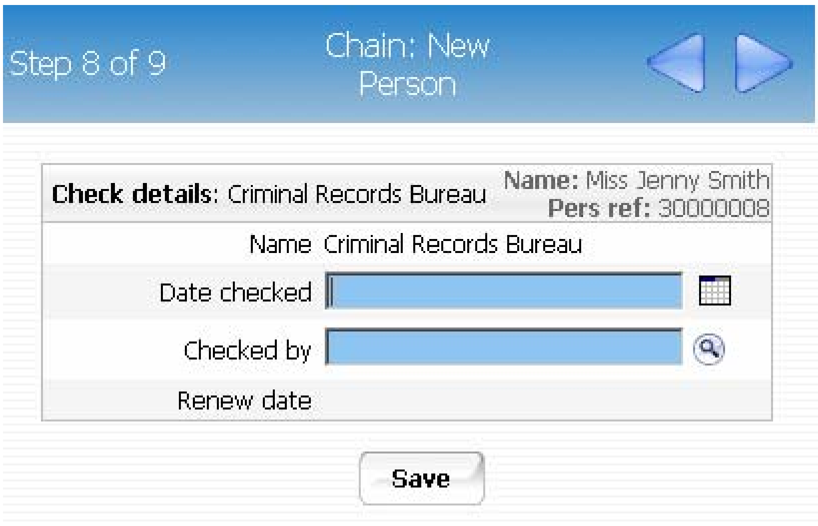


3. Enter details of date checked and who checked by. The checked by name should be the name of the person who signs the paperwork as a true copy.
4. Click the 

button.

5. **If you are required to also add details of additional checks**, click the button to return to the previous step.
6. Click the button to move back to checks option.
7. Select the check type (for example Criminal Records Bureau) from the Options Pane.
8. Click on the Check Details form in the Action Pane

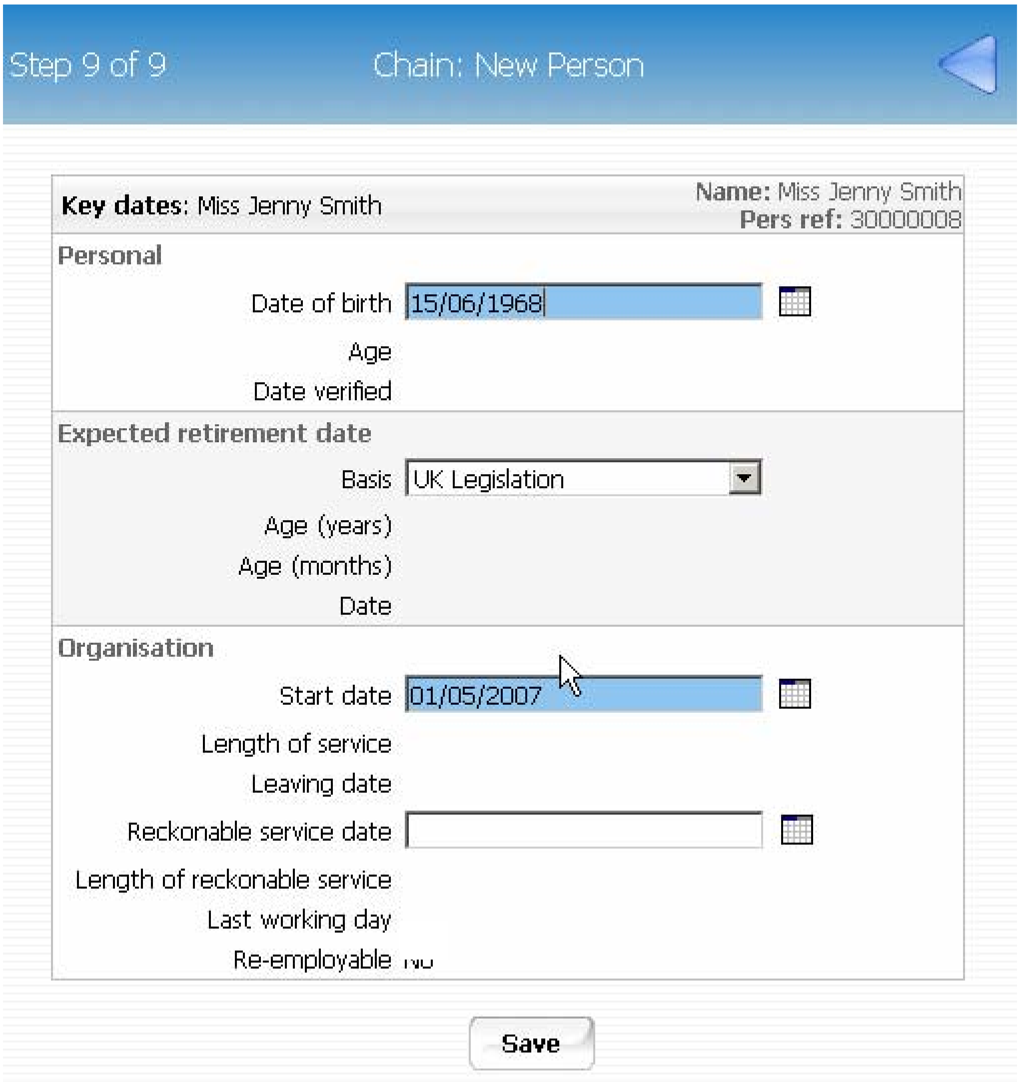




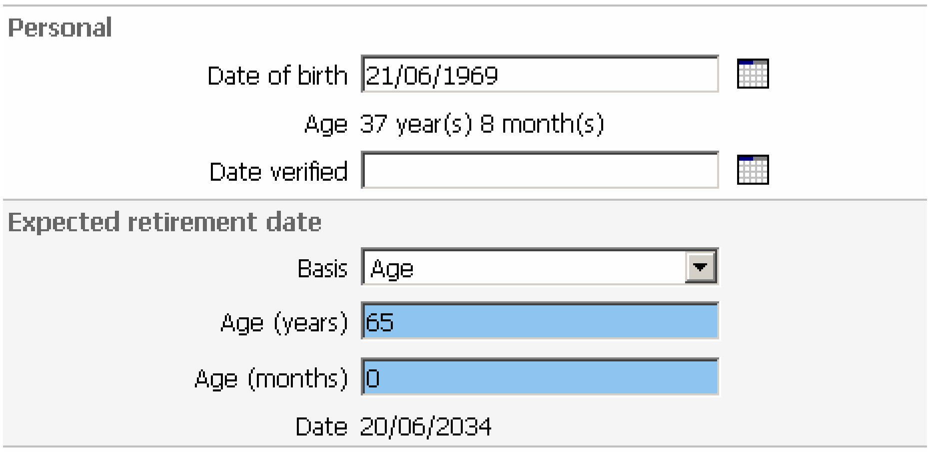
9. Enter the Date checked and Checked by details. For OH Medical Clearance, CRB and Security checks the 'checked by' name should be the person who signs the CHRIS/10.
10. Click the Save button.

6.8 Key Date Details

1. Click on the Next Step button

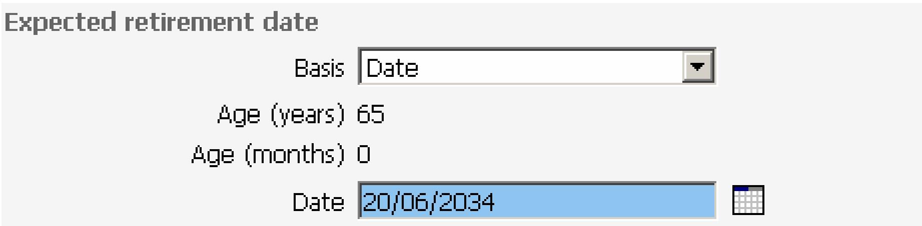


2. Enter Date of Birth
3. Enter expected retirement date. Select “Date” from the Basis drop down list and input 30 September of the academic year in which the individual turns 65 (Unestablished/Assistants) or 67 (Established)
4. To save calculating this date first enter expected retirement date basis of Age and type in 65 if an unestablished or assistant position or 67 if established.

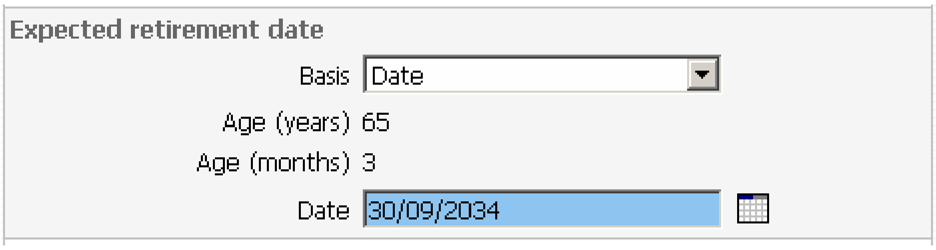


5. Click on the 

button



6. This will automatically calculate the correct year, for those people with a birthday on or before 30th September which can then be manually changed to the 30th of September for that academic year. For those birthdays after 30th September, the year will need to be changed to the following year.



Enter this date and click on the Save button.

7. Enter Reckonable service date. This will be the same as the organisation start date except where an employee is joining under TUPE conditions or some other arrangement where previous service is to be recognised. This field *must* be completed for reporting purposes and Trent will not pick up the organisation start date if it is left blank.

8. Click the 

button
Check that the age calculated is "sensible" as a way of verifying your entry. There is no validation of the age within Trent. It is possible to enter any date of birth.

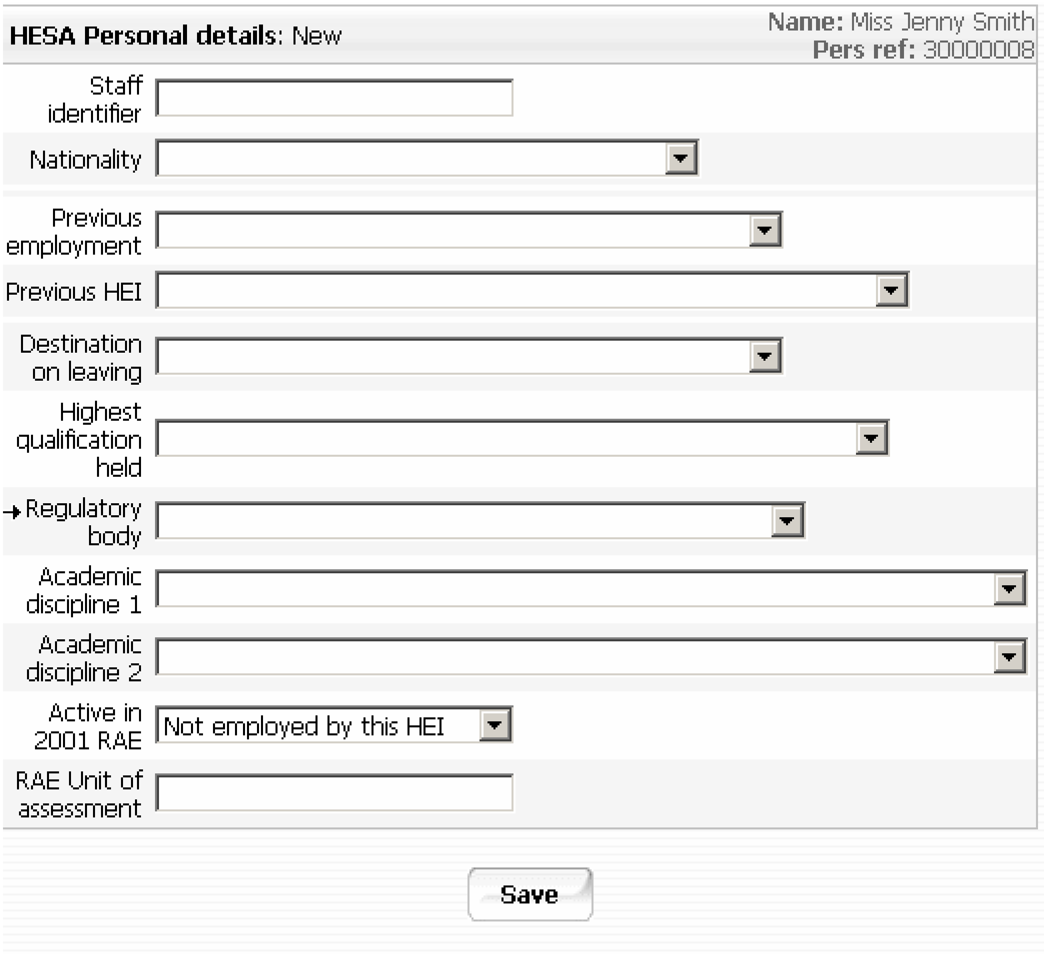
7 Additional Personal Information Data

Once the key data for a person has been entered into Trent via the process chain, you can add and view/amend their details using the other options available in the Personal Information part of the People module. Making changes to people data is covered in a separate course module. There are at this stage still some additional personal details recorded on the Certificate of Acceptance Form CHRIS/20 that need to be input.

7.1 HESA Personal Details

These details will only need to be completed for employees of the University who are deemed to be HESA returnable. The source of this data is Part 3 of the Certificate of Acceptance.

1. Use the search facility to locate the person whose address details you wish to maintain or if already working with the correct record use the navigation trail to return to the people menu.
2. Select HESA personal details

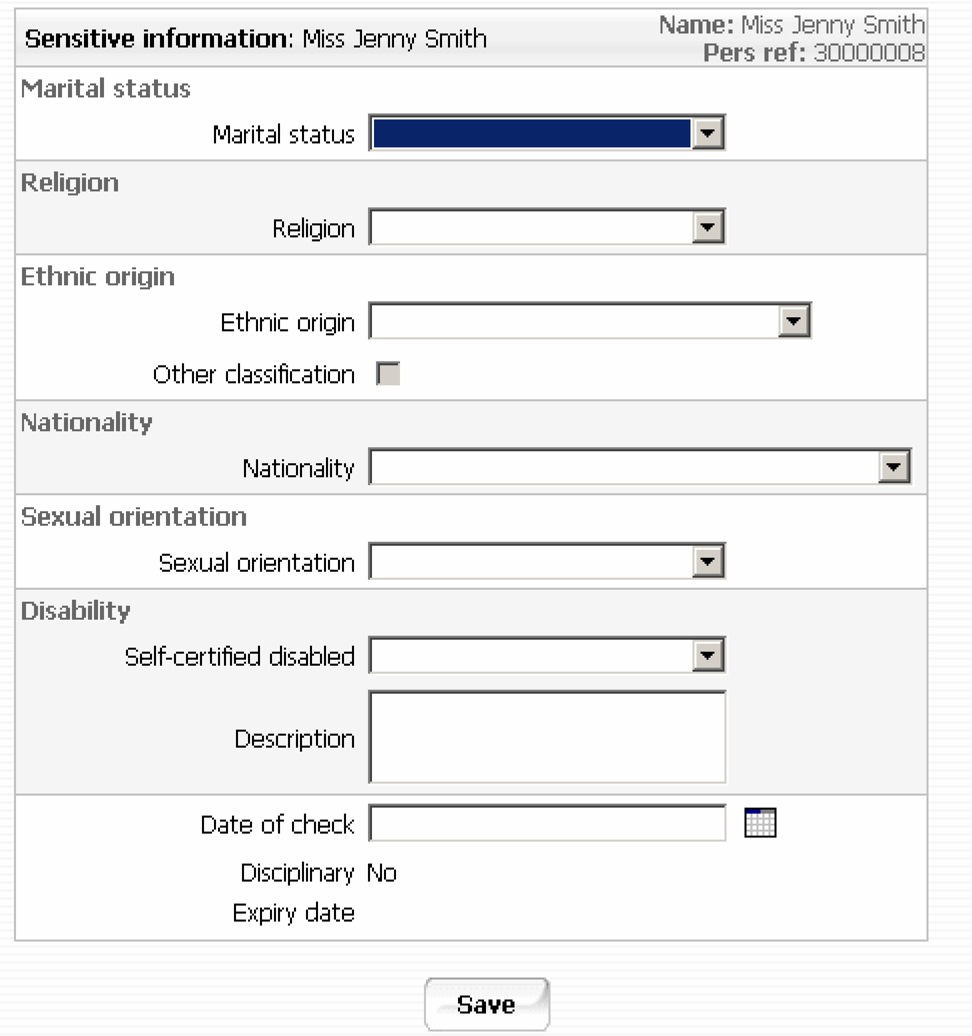


3. The Staff Identifier is assigned automatically in Trent when a new form is saved. If a person has previously been employed by the University and employment was prior to 1st April 2006 then SECQUS will need to be consulted in order to ascertain the persons HESA ID.
4. Nationality is obtained from Part 3, Section E of the Certificate of Acceptance form CHRIS/20
5. The previous employment field is used to record the nature of employment of the member of staff before entering employment with the University, this can be obtained form Part 3, Section E of the Certificate of Acceptance form CHRIS/20
6. Where a persons previous employment was with another UK HEI then question 32 of the Certificate of Acceptance form CHRIS/20 will be completed and this field should be used to record the institution identifier. If a person has never worked for a UK HEI then this field does not need to be completed.
7. Leave destination on leaving blank, this will be completed when the person leaves the University's employment.
8. Highest Qualification Held is obtained from Question 32 of the Certificate of Acceptance form CHRIS/20
9. Regulatory Body is only necessary for staff classified as Academics in the Clinical School. Regulatory Body is captured on the Certificate of Acceptance form CHRIS/20, section E question 39.
10. Academic Discipline 1 and Academic Discipline 2 is obtained from question 36 of the Certificate of Acceptance form CHRIS/20. Where this is one subject, academic discipline 2 need not be completed.
11. Active in 2001 RAE and RAE Unit of Assessment are populated by data import initiated by the Academic Division. Contract teams and the HESA Staff Correspondent have no involvement with the population of these fields.
12. Click the **Save** button.

7.2 Sensitive Information

The information required to complete this form can be obtained from the Certificate of Acceptance (tear-off page)

1. Use the search facility to locate the person whose address details you wish to maintain, or if already working with the correct record, use the navigation trail to return to the people menu.
2. Select Sensitive Information



Sensitive information: Miss Jenny Smith

Name: Miss Jenny Smith
Pers ref: 30000008

Marital status
Marital status

Religion
Religion

Ethnic origin
Ethnic origin
Other classification

Nationality
Nationality

Sexual orientation
Sexual orientation

Disability
Self-certified disabled
Description

Date of check
Disciplinary No
Expiry date

Save

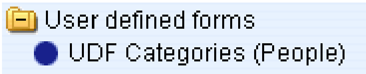
3. Record Nationality, Ethnic Origin and Disability information if applicable.

   We are not making use of the following fields:
   Marital Status
   Religion
   Sexual orientation

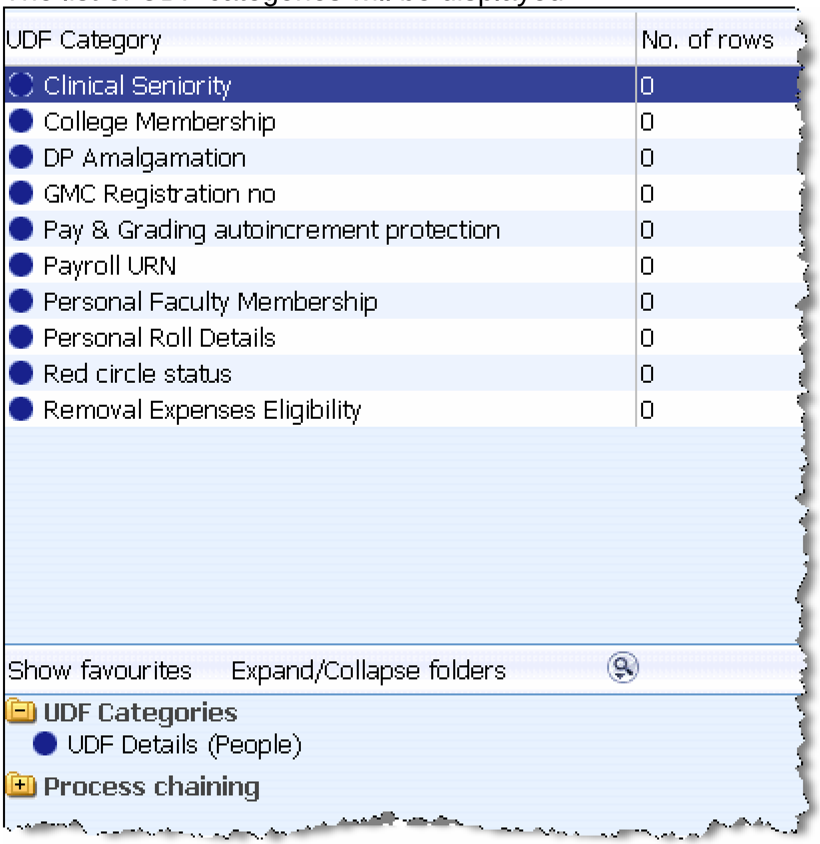
4. Click the Save button

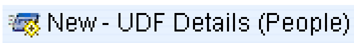
7.3 User defined Fields

Although Trent is very comprehensive there are some items of data specific to the University that the standard software cannot hold. User defined fields are used to save information which is not already included within Trent. User defined fields must be attached to User defined categories.

5. Use the search facility to locate the person whose details you wish to maintain or if already working with the correct record use the navigation trail to return to the people menu.
6. Select the User Defined Form folder from the main menu.
7. Select UDF categories (People) 

8. The list of UDF categories will be displayed



9. Select the UDF category required
10. Select UDF Details (People) menu and then 

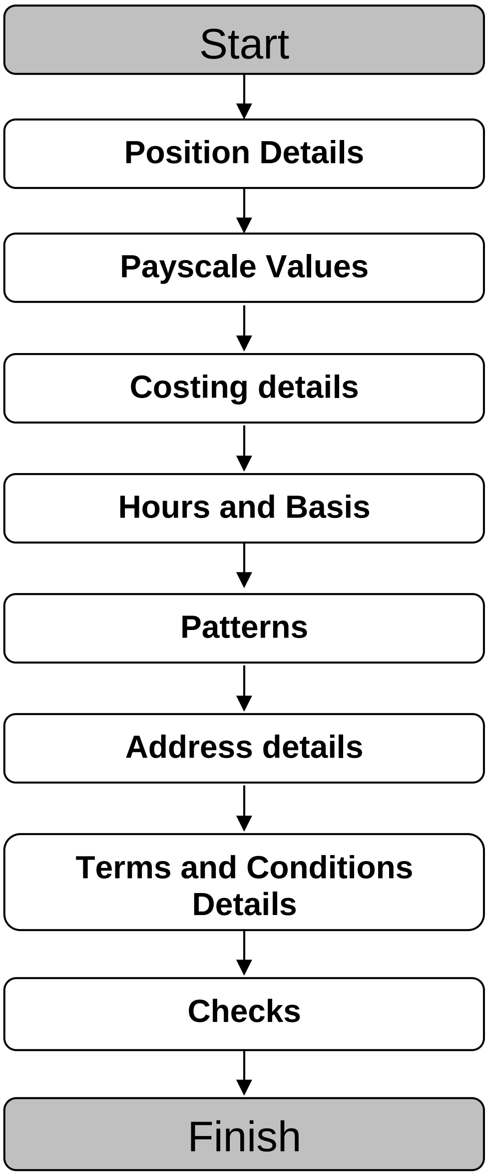
11. The relevant form will be displayed in the display pane
12. Complete form
13. Click on the 

button.

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.



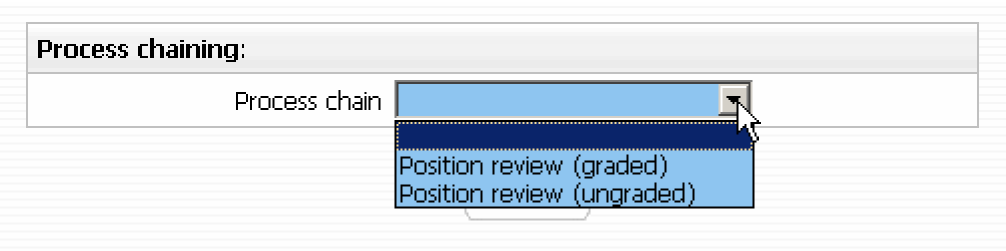
Attaching a person to a position will change the Position into an occupied position and its icon will change from green to blue

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

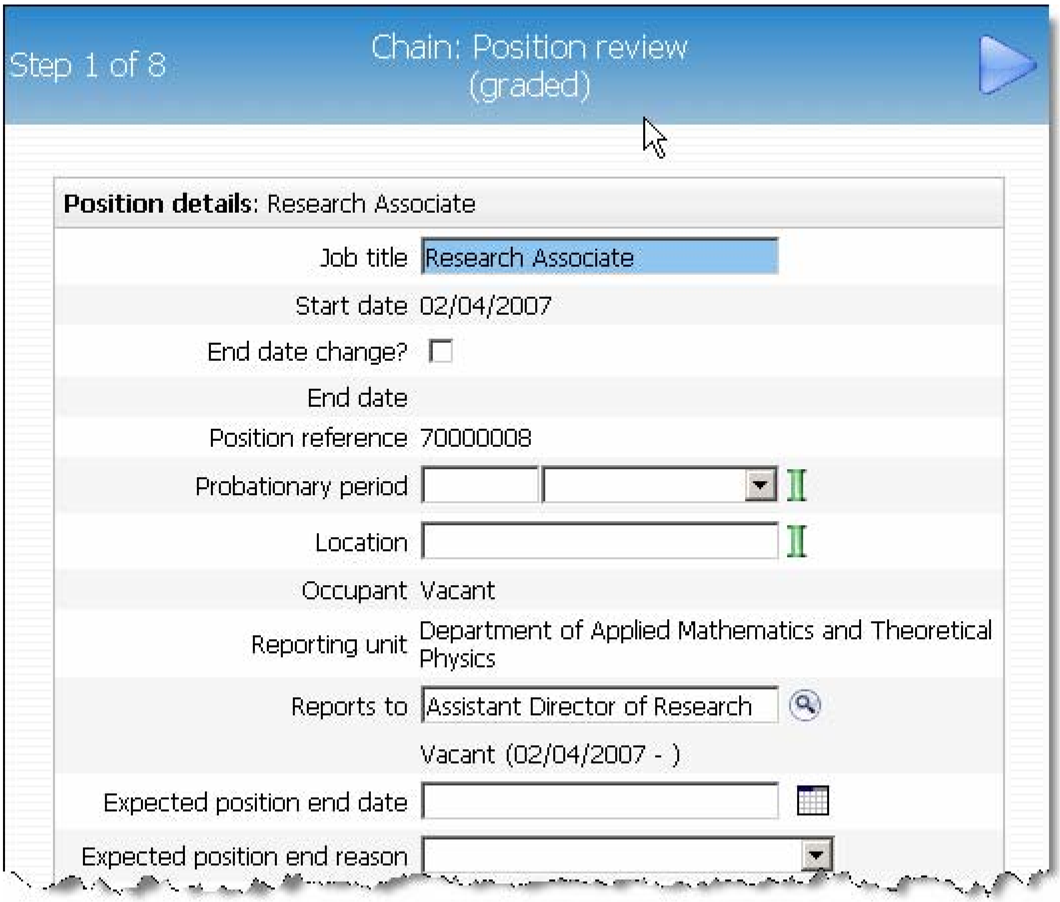
4. Select the Process Chaining option and type in the required date in the effective date field.
5. The resulting form will allow you to select the required Process Chain from the picklist available.



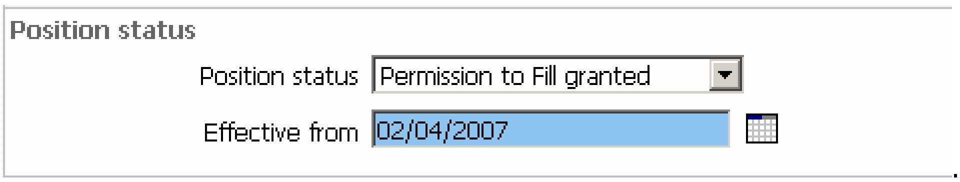
6. Select Position review (graded) or position review (ungraded) as appropriate.

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

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



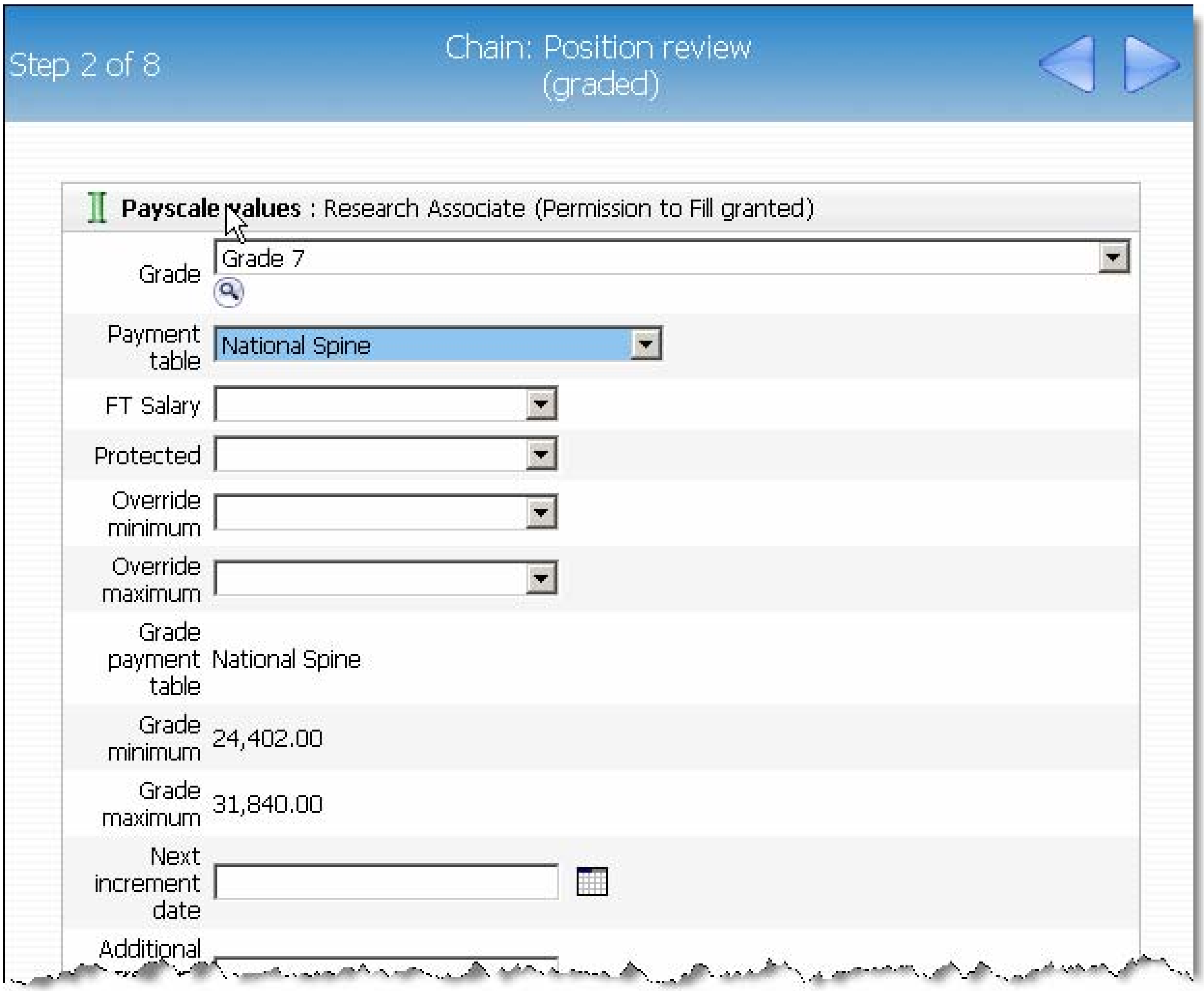
8. Enter the Probation period for the position.
9. Check that the Reporting Manager information is correct.
10. Check that the Position Status is set to Permission to Fill Granted, this will authorise automatically for new positions.



11. 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.



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.

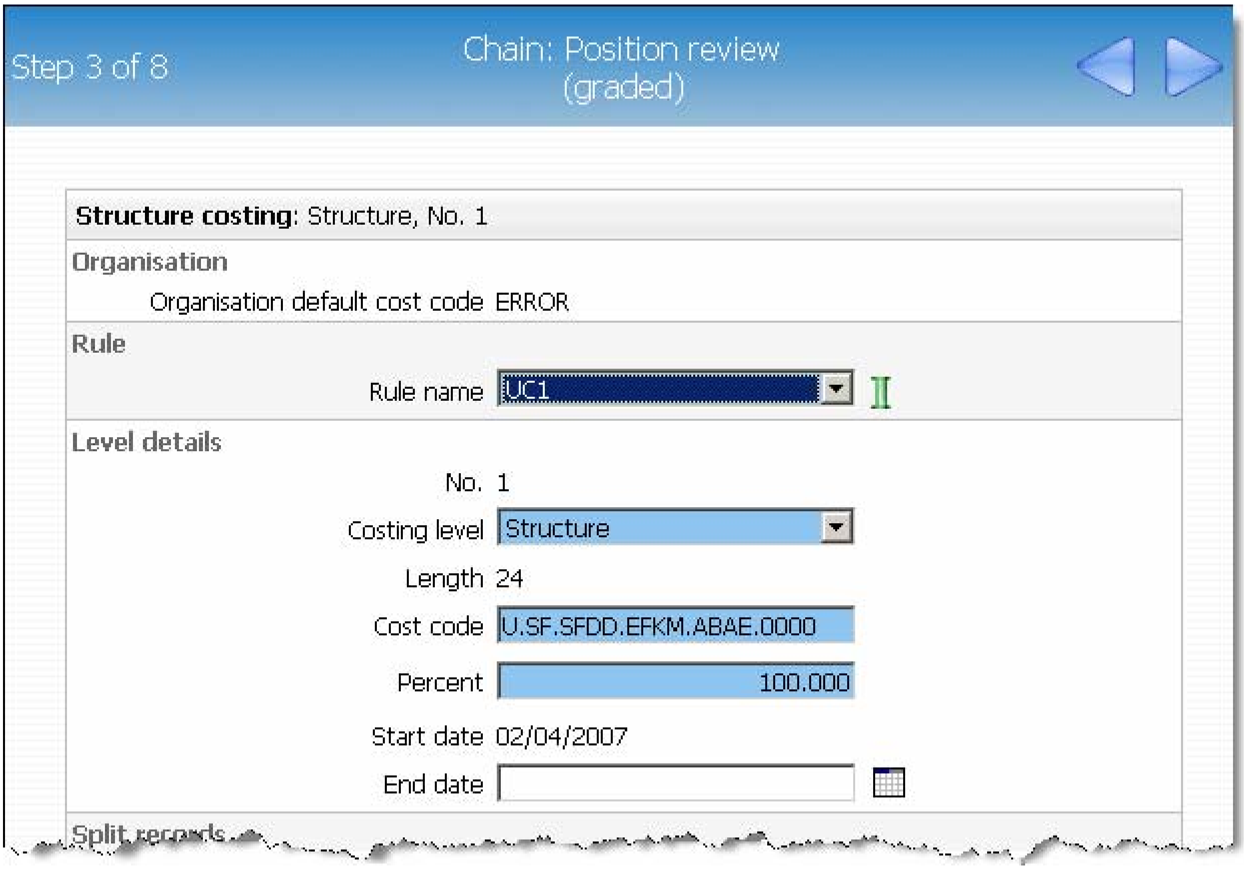
Where the salary is on a contribution point the FT Salary point should be equal to the override maximum.

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

3. Click the Save button

8.4 Costing Details

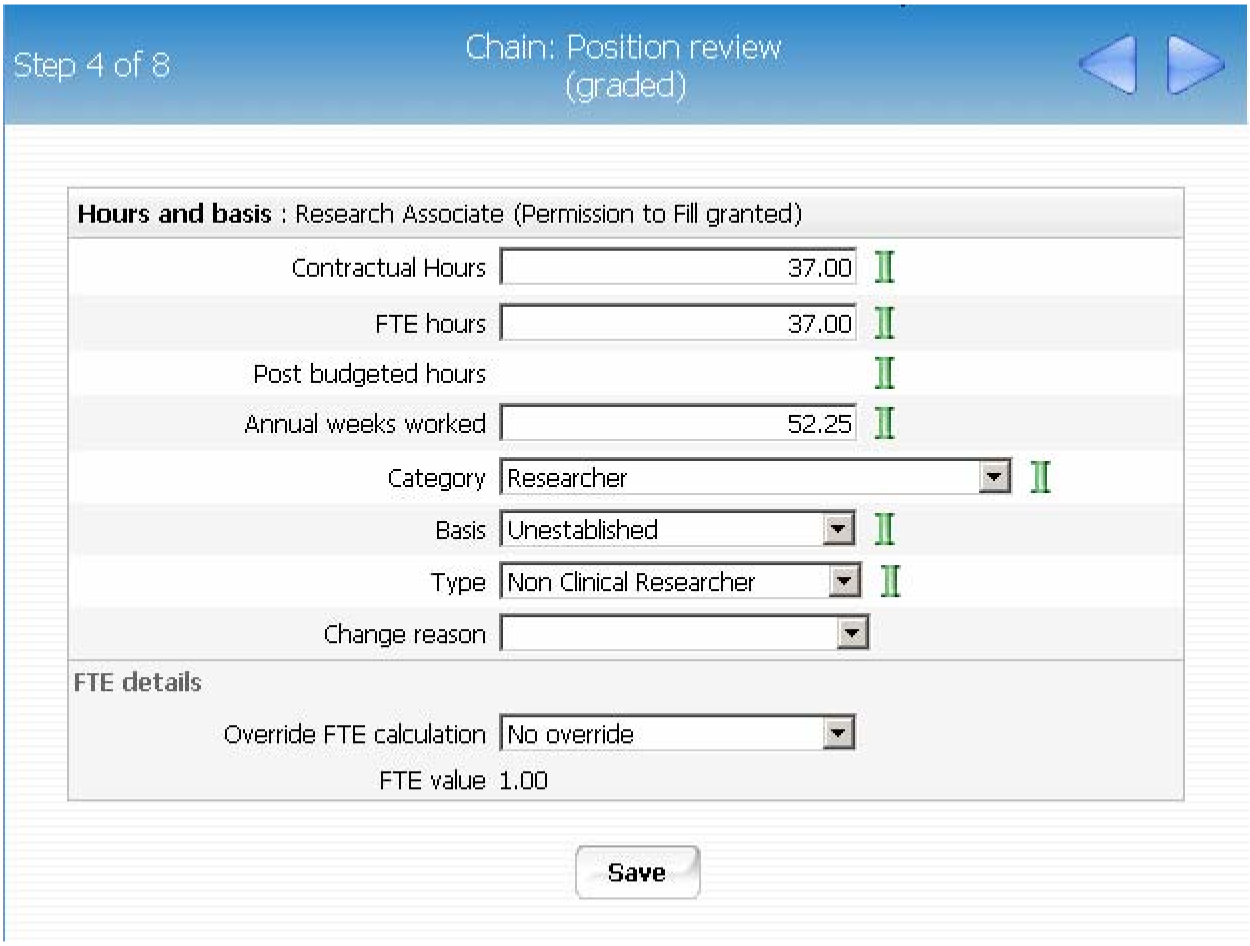
1. Click on the Next Step button, this will present you with the form used to check/enter the costing information.



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.



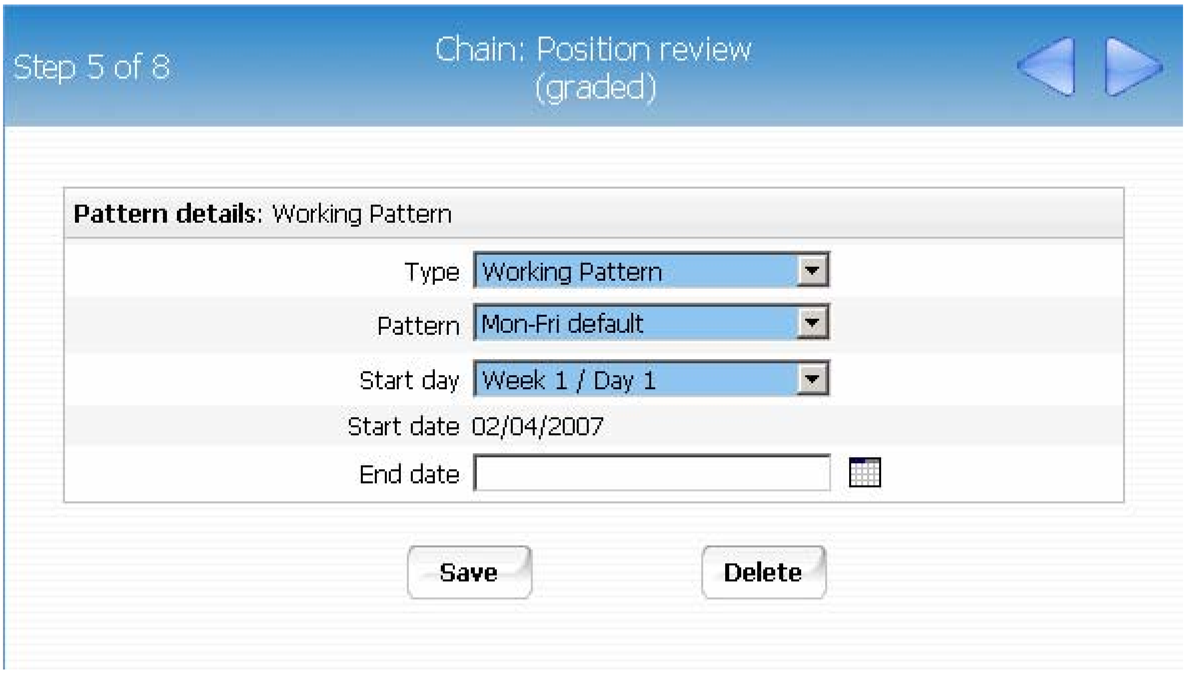
2. These details should be inherited from the Post, but ensure the all the relevant data is entered (Contractual Hours, FTE Hours, Category, etc)

3. Click the 

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.



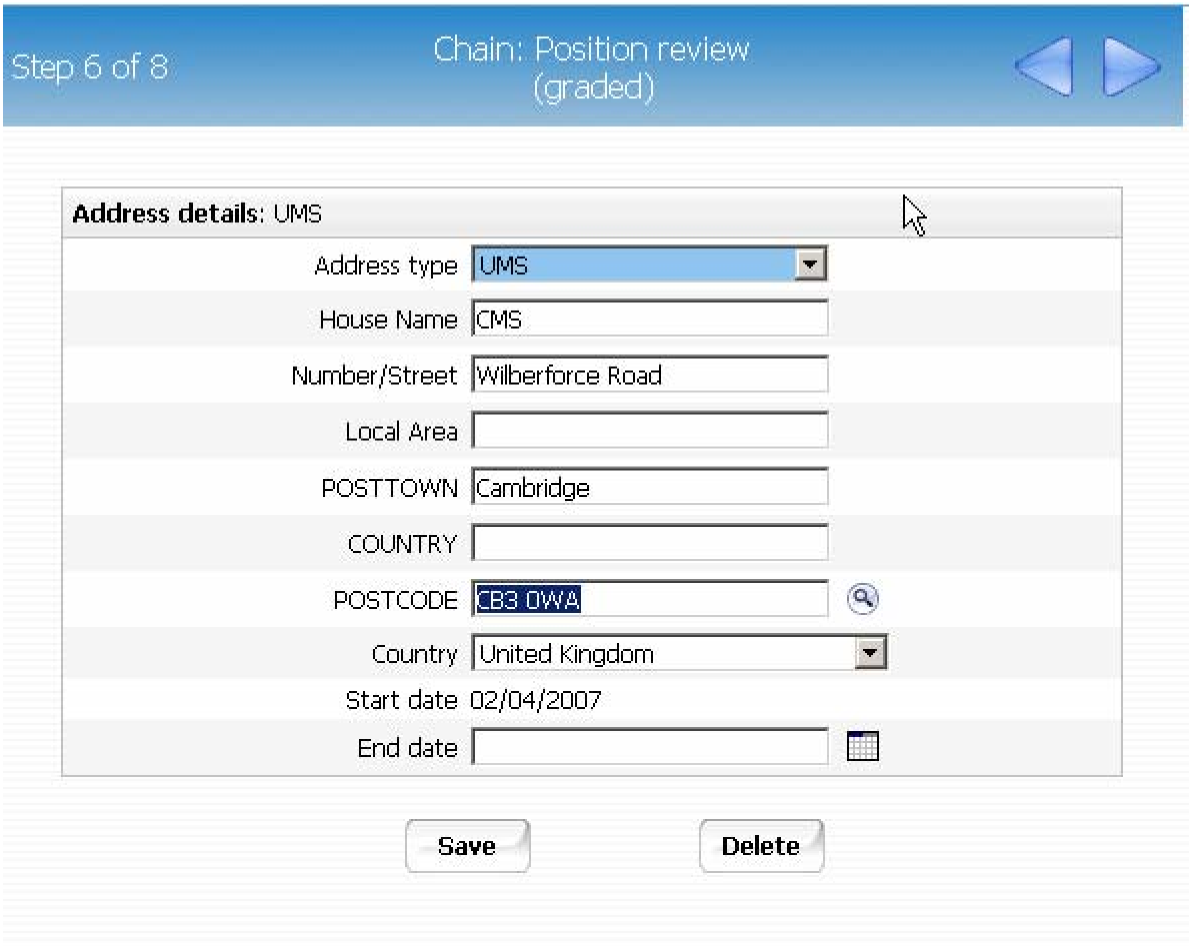
2. The information viewed will be that inherited from the Post. If the working pattern is different at position level, details can be amended here.

3. Click the 

button

8.7 Address details

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



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

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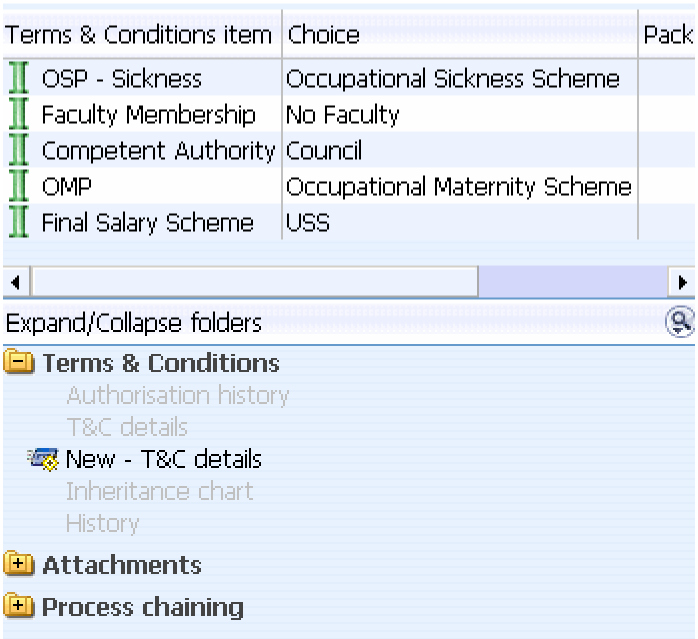
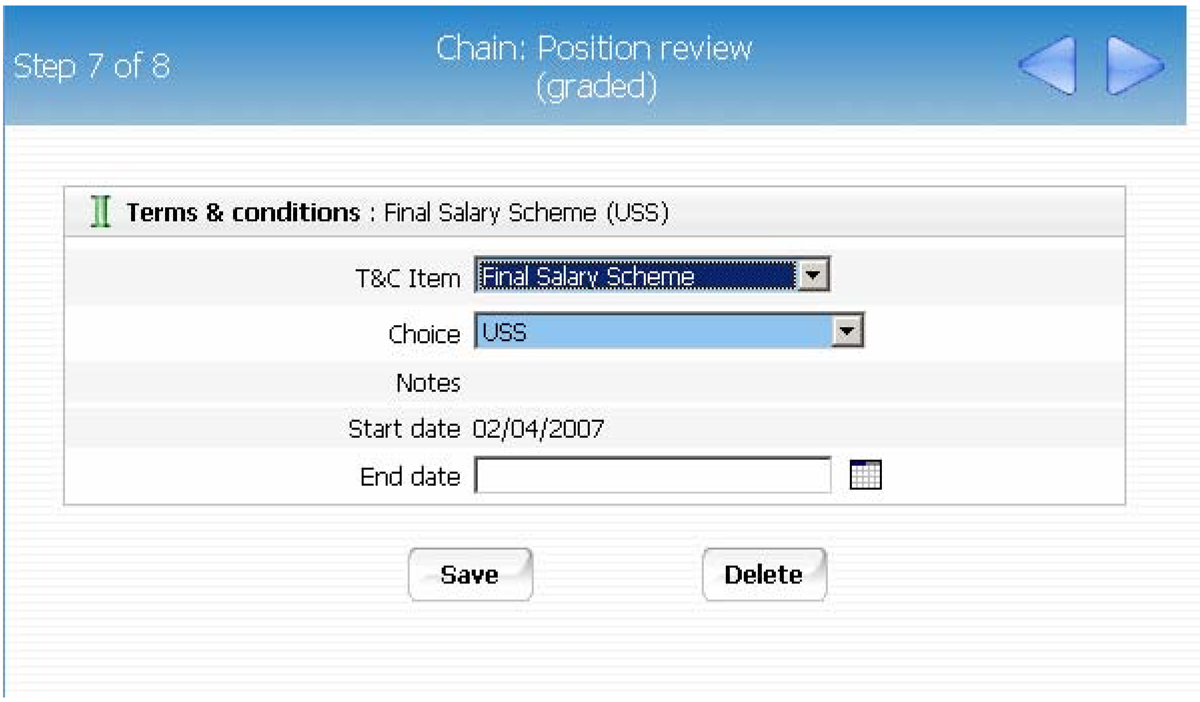
8.8 Terms and Conditions Details

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



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



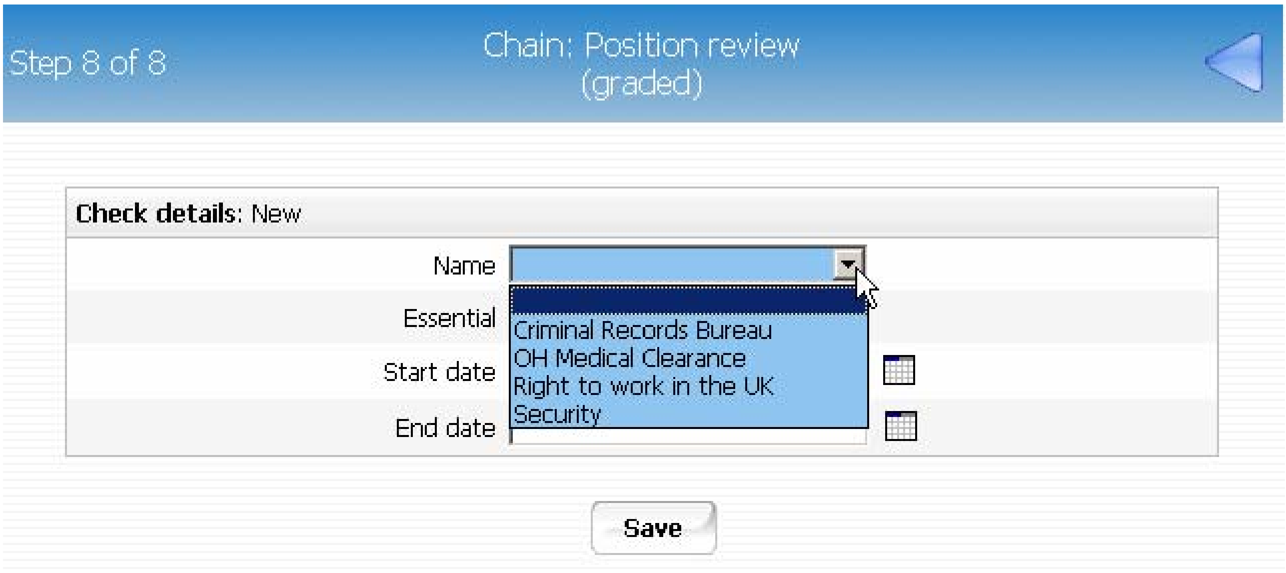
3. Click the 

button

8.9 Check details

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

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.



3. Select the required check. Check the essential box and add the start date

4. Click the 

button

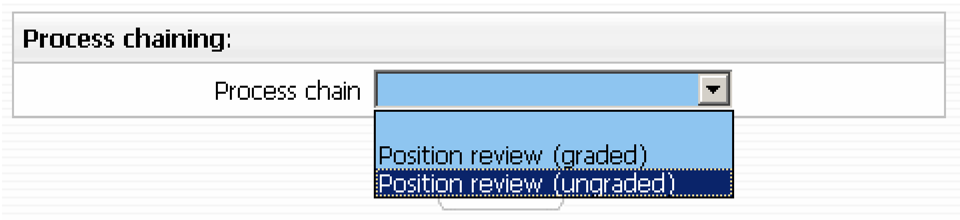
Use the navigation trail to exit from the screen chain once compete.

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.

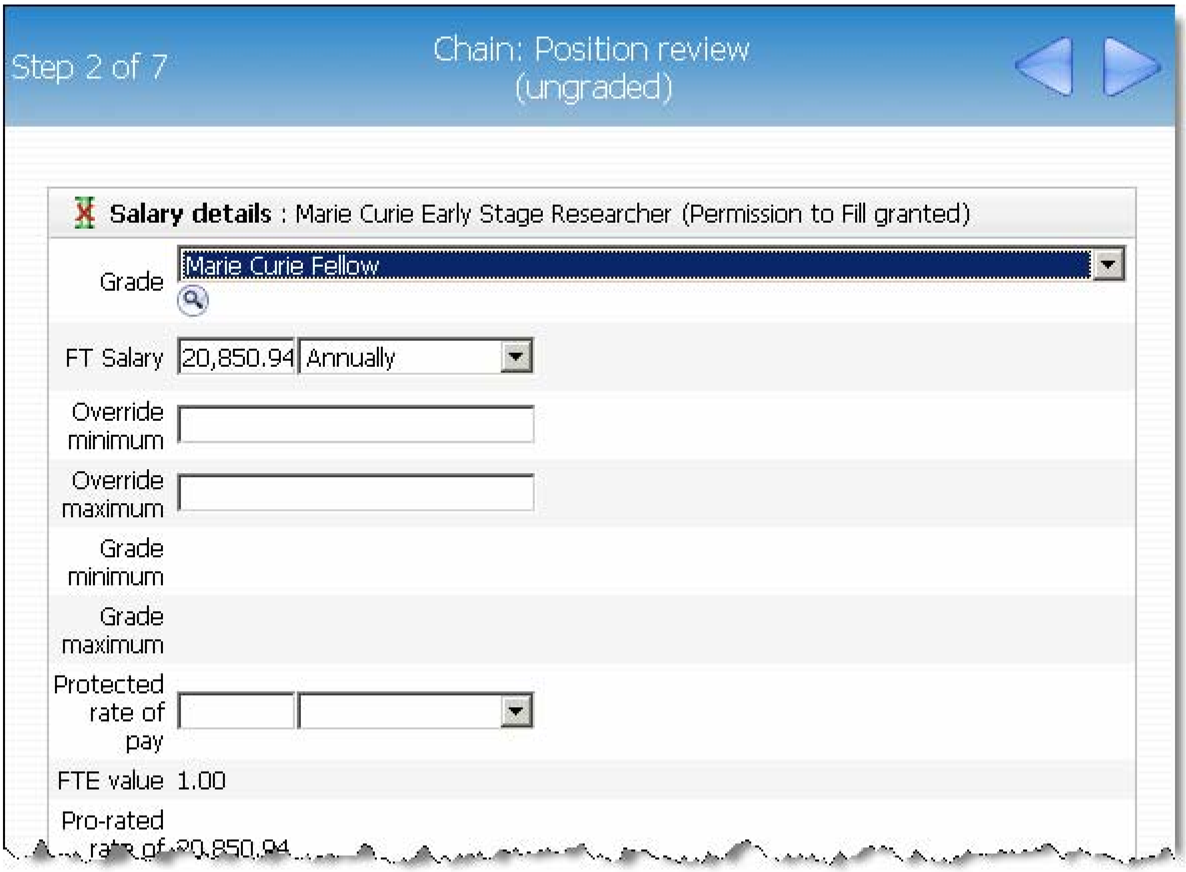
8.10.1 Starting the Process

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



8.10.2 Salary Details

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



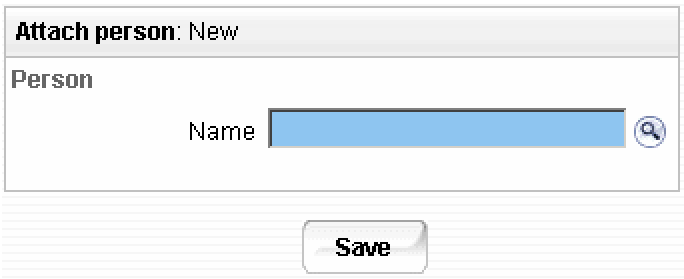
Enter the salary for the position and the frequency from the drop down box

Click the Save button.

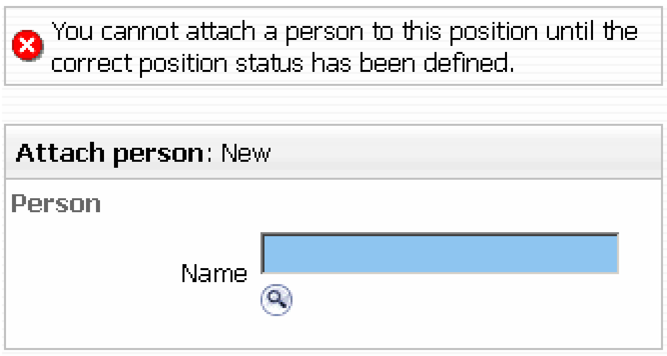
9 Attaching a Person to a Position

When the permission to fill status of a position is set to Permission to fill granted, attaching a person to a position will change the Position into an occupied position and its icon will change from green to blue

1. With the University of Cambridge selected, click on the Positions menu in the Action Pane.
2. In the search window, select to search by **Position ref no**, enter the required Position reference number in the search field and click on the magnifying glass icon (or press return)
3. Open the Mini Explorer
4. With the position selected that is to receive the new attachment, click on Attach person in the action pane and enter the effective date when they should be attached from. Trent opens the Attach person page in the display pane

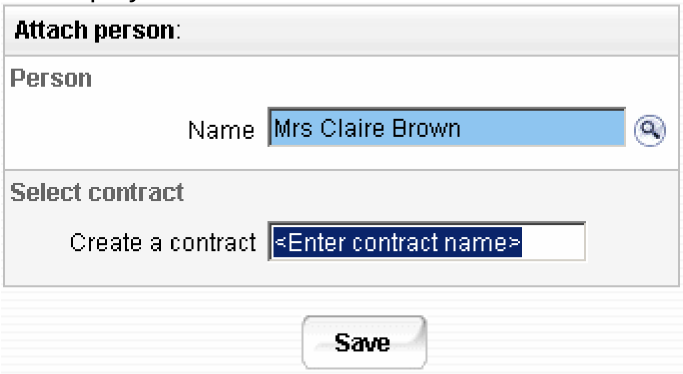


Note:
If the permission to fill status has not been set to permission to fill granted the following message will be displayed:



If this is the case change the permission to fill status in the position details form.

5. Click the search icon to search for the person by name or search by personal reference number. Once the person has been selected further details on the attach person page are displayed.



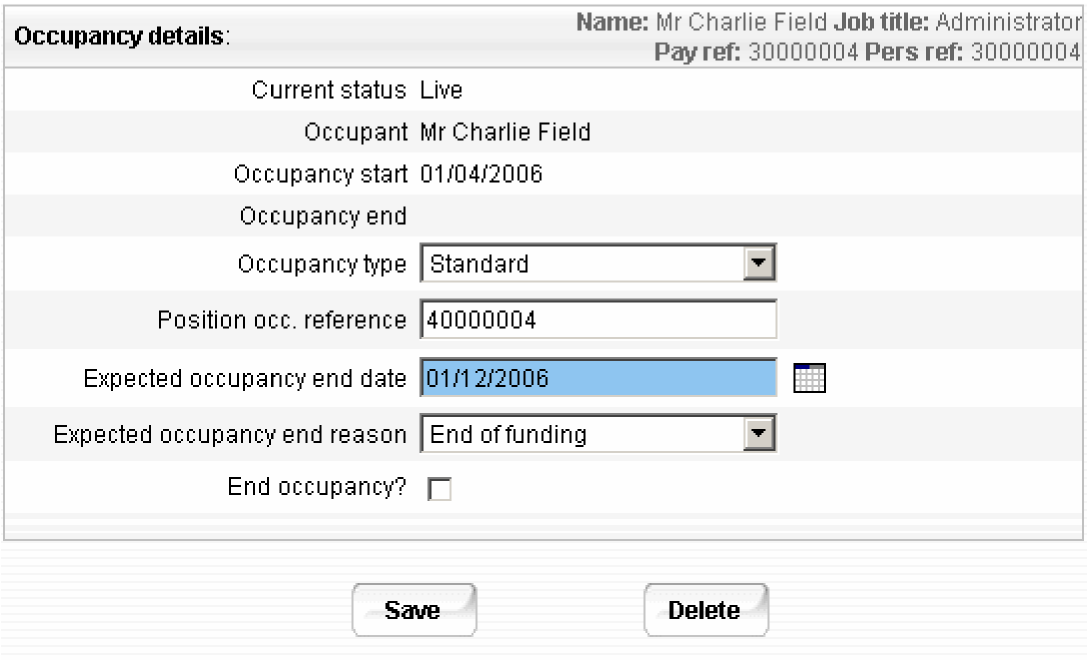
6. Don't enter anything in the Create a contract field, this will create a contract with the persons first initial and surname.
7. Click the 

button
8. You will see the person attached to this position in the mini explorer diagram.
9. Trent will automatically change the permission to fill status to no permission status.

9.1 Attaching a person to a position on a temporary basis

If a person is appointed to a position temporarily you also need to enter an occupancy end date.

1. Follow the procedure for attaching a person to a position
2. With the person and position visible in the navigation trail, select position details and then occupancy details
3. Enter the expected occupancy end date. The expected occupancy end date should be no later than the position end date
4. Enter the reason for the end of occupancy, this could be a different reason to the position end reason.



5. Click on the 

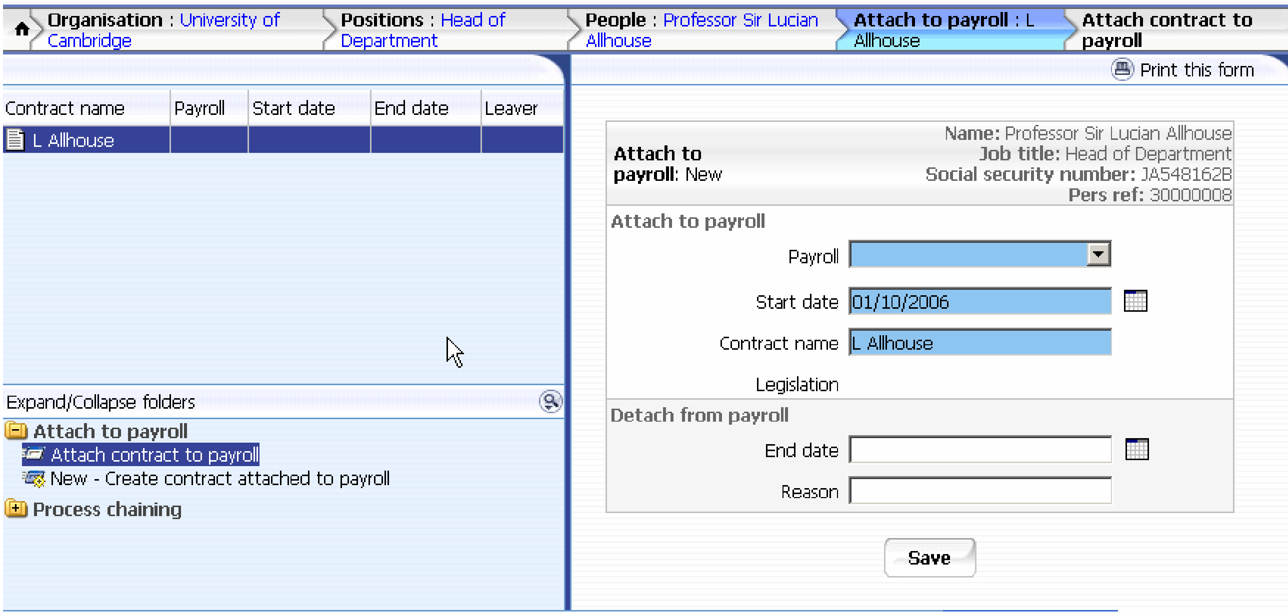
button

10 Attaching a person to Payroll

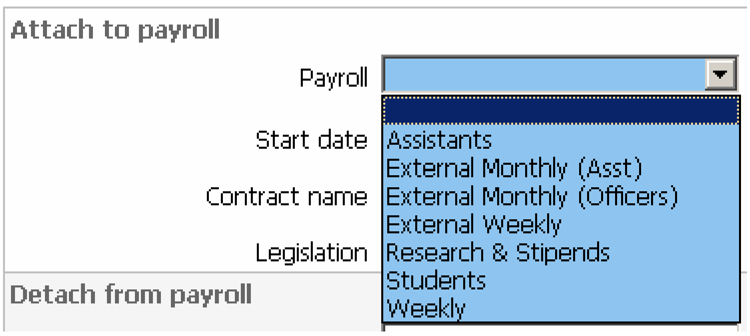
Once the relevant employee details have been added and attached to the organisation, via the position, you will need to attach the employee to payroll. This is achieved through the Attach to Payroll option found under the Payroll folder within the People area of Trent.

Navigate: Organisation > People > Payroll > Attach to Payroll

1. With the University of Cambridge selected, click on the People menu in the Action Pane.
2. Search for the person using surname or person number if known and click on the magnifying glass icon (or press return)
3. Select the Payroll menu and then attach to payroll option
4. Choose attach contract to Payroll



5. Click the drop down arrow to the right of Payroll and select the appropriate payroll There are 7 payrolls in use: Assistants, Research and Stipends, Students and Weekly are used internally and there are 3 used for external units – External monthly (Asst), External Monthly (Officers) and External weekly.



6. Enter the date when this contract is to be attached to payroll
7. Click on the Save button
8. Once you have saved the record, the payroll number is automatically generated by Trent. This will be the same number as the personal reference number.

11 Adding Permanent Elements

11.1 What are elements?

Elements are part of someone's pay and can include additional allowances or deductions. The term permanent just means that it is received/ deducted on a regular basis.

11.1.1 Frequency

Allowances can vary in frequency, i.e. an allowance may be paid every month, every quarter or even annually. However, the user will not need to worry about this as each individual element's frequency will be specified when the system is configured and hence the correct payment will be made automatically.

Trent provides the option to enter 'end dates' for allowances to ensure that payment is automatically stopped at a particular point in time. As all allowances are date effective there is also the added benefit that any back pay will automatically be calculated and paid during the payrun following the entry of the allowance.

11.1.2 Attributing an element to an employee

The element Basic Pay will be attached to the post and details will then be inherited down to the post holder.

Sometimes a specific position will attract certain additional payments, (contractual elements).. E.g. Early Morning Supplement, Head of Department; and will be attached by the East Room

Elements specific to the individual will be attached on an individual basis by the Payroll Team after the employee has been attached to the payroll.

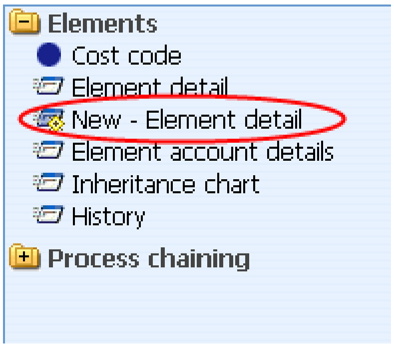
Permanent elements set up for a new starter by the East Room will be reviewed as part of the Payroll process chain.

11.2 Attaching elements

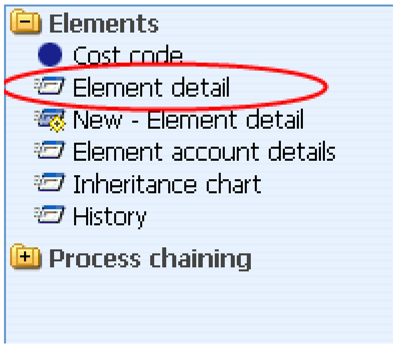
All elements to be attributed to an employee are attached using the same form 'New-Elements details'.

Navigate: **Organisation Structure > People (find employee) > Payroll > Elements > New – Element Details**

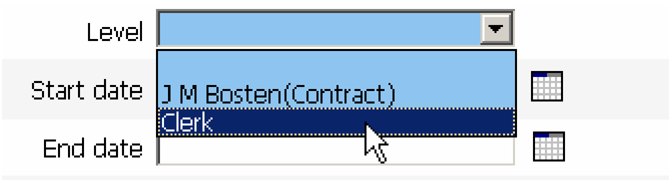
1. In order to change an employee's permanent payment elements, you need to click the Elements option in the Payroll menu and choose either:
   - New – Element Details to add new elements

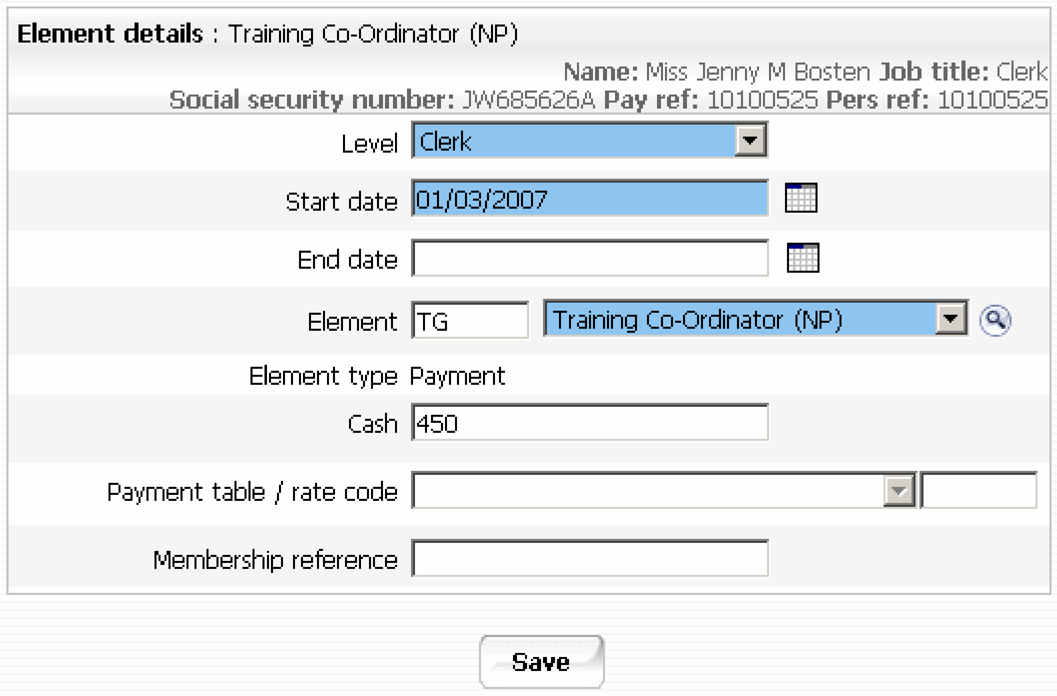


   - Element Details to view and/or amend existing elements



2. Select the position from the Level drop down box (not the contract). As a general rule, if the element is an allowance it will be attached at position level, whereas if it is a deduction it will be attached at contract level.





Element details : Training Co-Ordinator (NP)

Name: Miss Jenny M Bosten **Job title:** Clerk
Social security number: JW685626A **Pay ref:** 10100525 **Pers ref:** 10100525

Level	Clerk
Start date	01/03/2007
End date	
Element	TG Training Co-Ordinator (NP)
Element type	Payment
Cash	450
Payment table / rate code	
Membership reference	

Save

3. For new elements, enter a start date. If the element is to be paid for a set period of time enter an end date.
4. Select the element from the drop down box on the Element field. (NP stands for non-pensionable). For existing elements enter the end date or change required.
5. For a cash based element enter the annual cash amount of the allowance in pounds and pence.
6. Click the Save button.

The content of the element details form changes depending on the type of element selected. There are different types of input methods for elements:

No details specified	An example of this is the basic pay element (which is an inheritable element) where the full calculation is dealt with by the system so you simply need to attach the element and do nothing else
Rate and payment tables	
Cash based	The majority of elements expect a cash amount to be inputted
Units based	However, some such as additional hours, overtime etc expect units of entry (a unit can be an hour, mile, day etc). Where the element is set to expect units the form will change accordingly. These are normally treated as temporary elements.

A full list of elements and their input method are included in the payroll course.
Some of the common elements include:

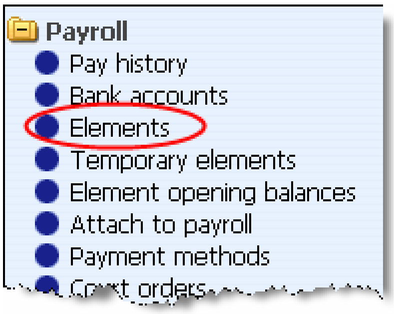
Basic Pay	Training Co-ordinator	Student loans
First Aid	Trade Union subscriptions	Clinical Payments
Loans-personnel	Pension contributions	Studentships

11.3 Element Costing

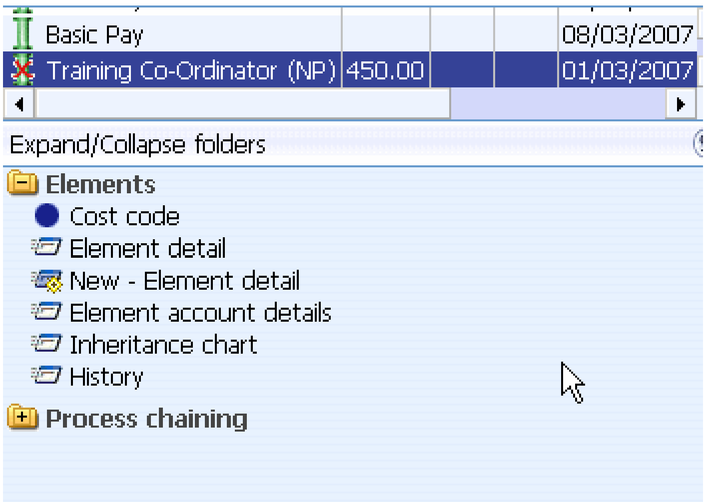
The element will be costed to the employees ‘home’ cost centre(s) as default.

If the element is to be to a different cost code than basic pay this needs to be actioned through **People > Payroll > Elements**

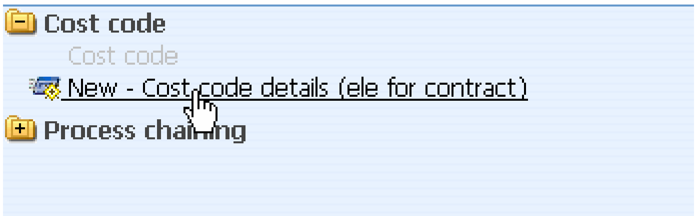
1. With the University of Cambridge selected, click on Organisation explorer.
2. Enter the correct effective date
3. Select People and search for the required person
4. Select the Payroll menu
5. Select Elements



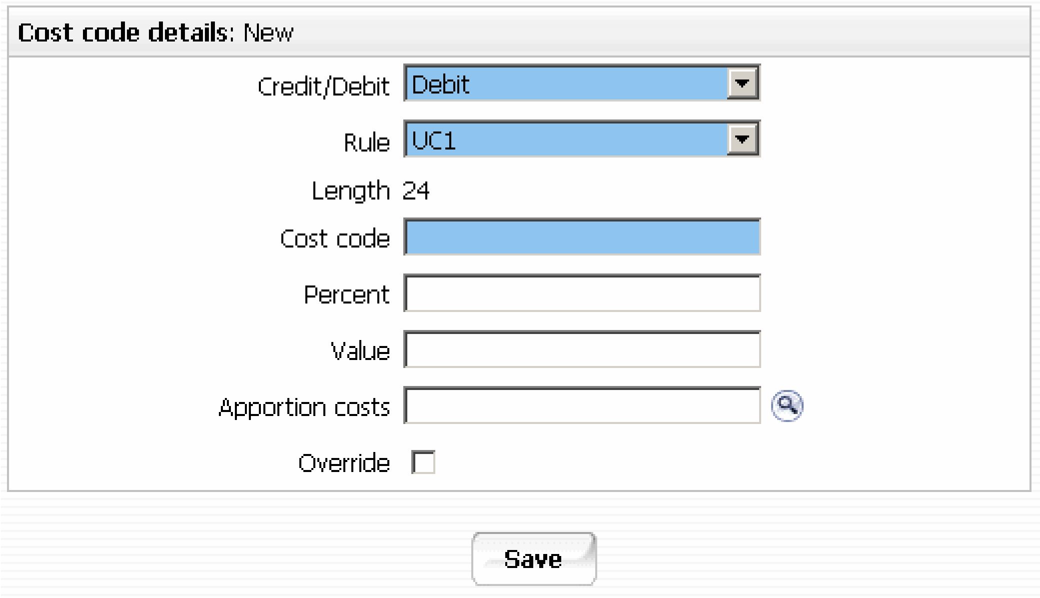
6. The existing elements for the person will be displayed. Select the element that requires the costing to be changed.



7. Select Cost Code, and New – Cost code details (ele for contract)



8. Select the Rule (there's only one, UC1) from the drop down box



9. Fill in the Cost code for the element
10. Percent should be set to 100
11. Value is left blank in most cases.
    This can be used if you wish to cost a set amount of a payment elsewhere (i.e. employee gets £500 allowance and £200 of it is funded by another dept regardless of whether the £500 changes)
12. Apportion costs is not used, leave this field blank
13. Override should be ticked as this then ensures that any additional values entered against this element are costed to the same place (i.e. backpay)
14. Click the 

button.

12 Inheritance

Throughout Trent you will see references to 'inherited values'. Inheritance is used to allow information to be applied to many levels of the organisation without having to enter it at every individual level and can save a lot of time as repetitive actions can be eliminated.

For example by setting annual weeks worked at 52.25 at the highest level all units, posts and positions within it will inherit this number of weeks.

The basic rule is that values attached to the organisation structure are used in payments and calculations for a person unless they are overridden at position level.

There are a number of items that can be inherited through Trent, including:

- Addresses, Contacts and Location
- Terms and Conditions
- Grades
- Patterns (e.g. working patterns)
- Hours
- Payroll elements
- Payment details

12.1 How does inheritance work?

At any point in the structure, Organisation, Unit, Post or Position, the user can attach attributes to be inherited. These may for example be grades, elements, locations, addresses or terms and conditions.

These attributes are then inherited down to each unit, post or position below the point at which they are attached.

12.1.1 Inherited items

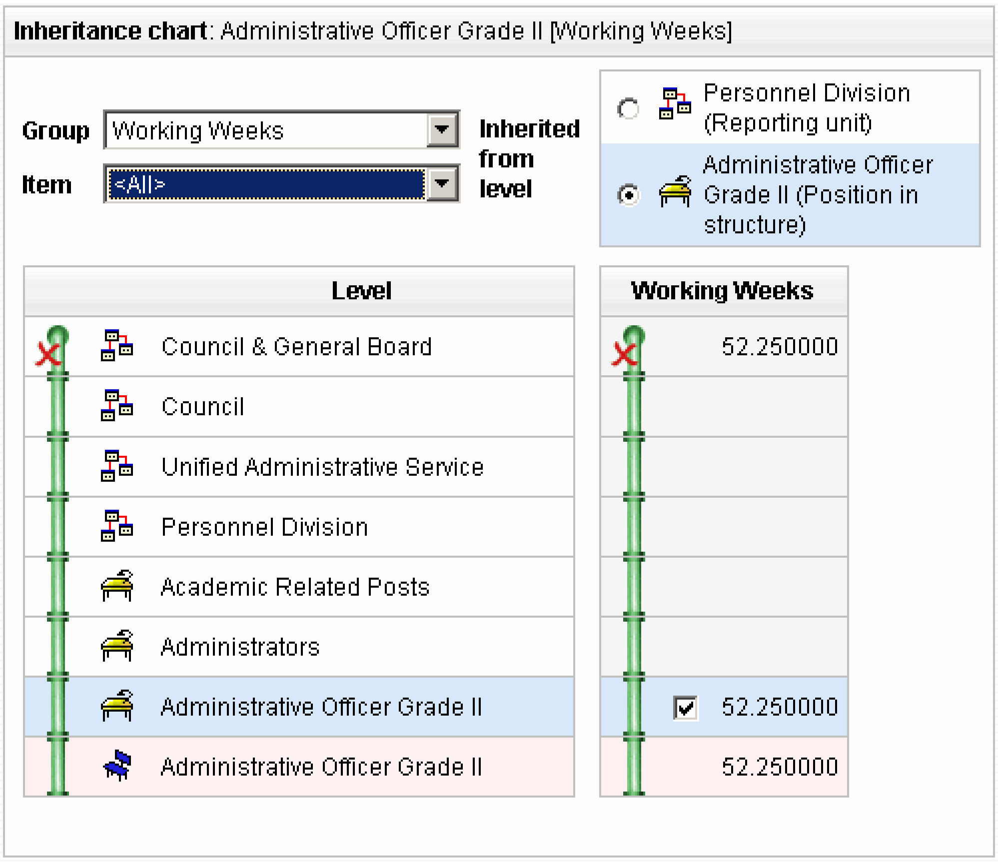
Inheritance items are accessed through the relevant details form (Unit Post or Position). The fact that an item is inherited can be seen by the presence of an inheritance icon next to the item.

12.1.2 Overrides

If the inheritance is not valid or appropriate, the attribute can be removed or replaced by another value. If it is replaced, then on that page there will be a not-inherited icon next to the item. Where inherited items are overridden, it is very important to be aware of the impact this has on the rest of the organisation structure and more importantly the information that is attached to it. When inheritance is overridden at a point in the structure, any items below that point in the structure will then inherit the new value.

12.1.3 Viewing Inheritance Charts

To see what is inherited and/or to change the inheritance back to the original value, open the inheritance chart form. Inheritance chart option is found on the menus for Position, Post, Organisation and Unit. The image below shows the menu for Position with the inheritance item working weeks selected.



The Level column shows the route of Inheritance down through the organisation structure.

The rows of information relate to the level within the organisation under the respective column.

The other column, in this example working weeks show the inheritance details for the selected group.

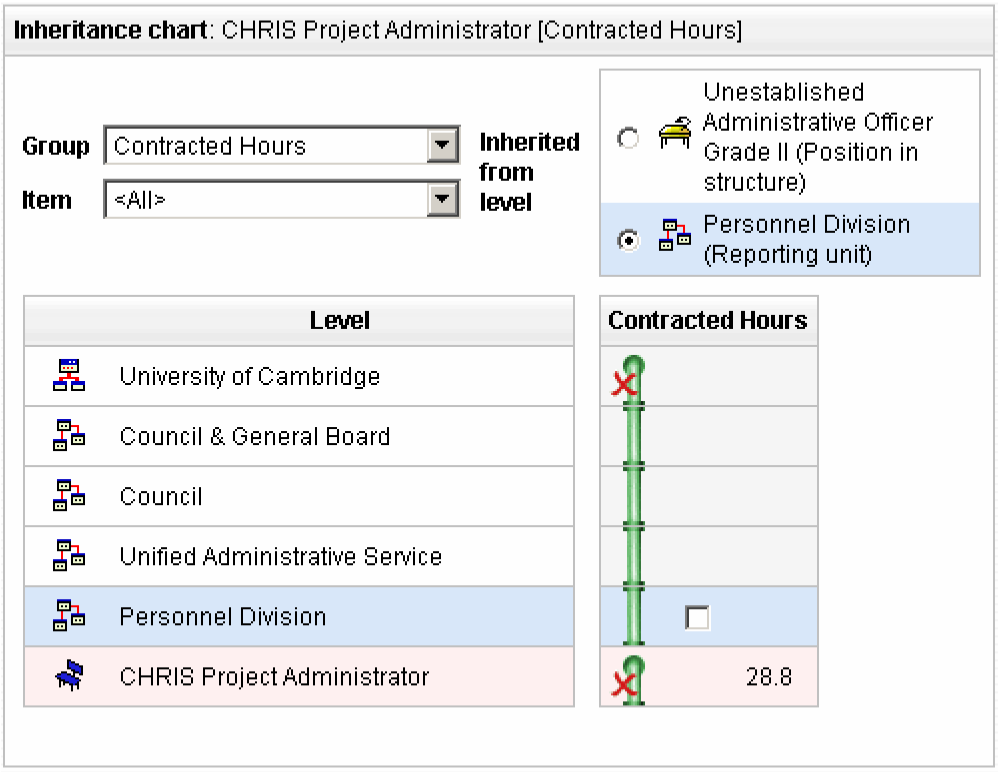
At the top level, the unit Council and General Board have 52.25 working weeks and this is inherited down through the structure so that all units, positions, posts and people who work under Council and General Board will share the same value for working weeks (unless other wise changed)

Each inheritable item is shown with a symbol to show whether the value has been inherited or has been overridden. The inheritance icons that can be displayed on the chart are as follows:

Icon	Description
	This icon appears at the top of the inheritance list. It inherits no details from above but does pass its own inheritance items downwards onto the next level.
	Inherit. The icon shows that the details will be inherited from the level above.
	Override. This icon indicates that the level has had an inheritance override applied to it.

There is a tick box in the penultimate level under Working weeks details. This enables you to break inheritance at this point and in so doing stop an item being inherited further down.

If it is ticked the final level will inherit the details from this level. If it is not ticked then the inheritance is broken at this point.



In this example contracted hours are overridden as this administrator works a 4 day week.