1 Introduction

The software system that holds and maintains employment and payroll information for staff at the University of Cambridge is called iTrent. The project to bring about changes regarding access to this information is called **C**ambridge **H**uman **R**esources **I**nformation **S**ystem (CHRIS).

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

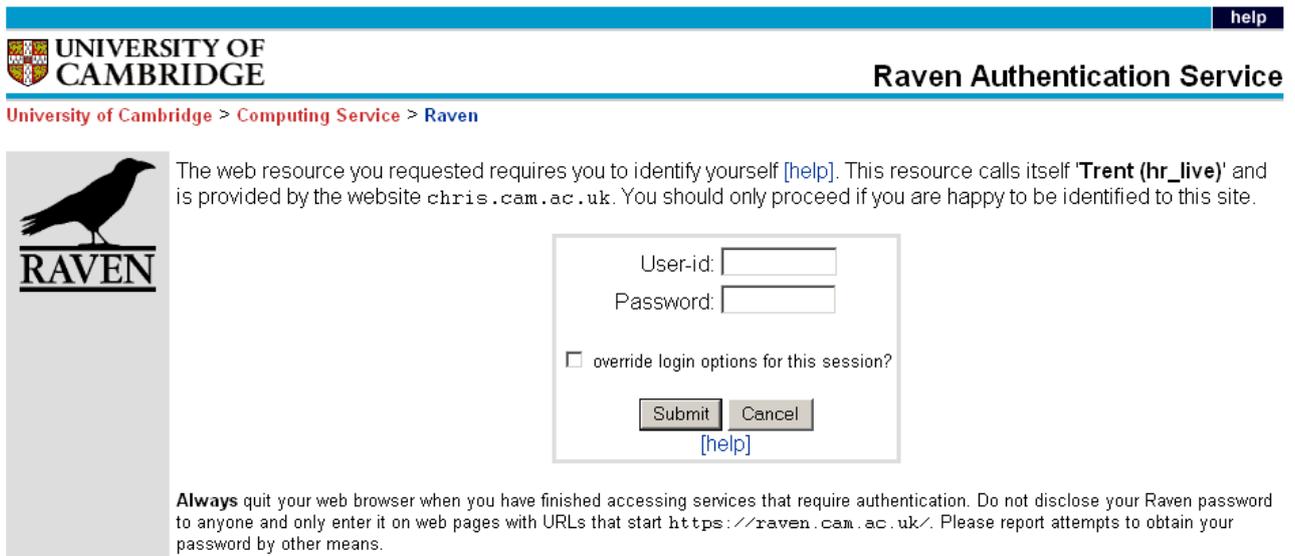## 1.1 The Login screen

Locate the iTrent icon on your desktop.

When you click on the shortcut, the page shown below will be displayed

Select the "Login (managers and administrators)" link, and then click on" log in"

 If you are a registered CHRIS user, please **log in**.

The Raven Login screen will be displayed, as shown below. Enter your user name and password (this is case sensitive) and press Enter or click on the 'Submit' Button.

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

1.2 The iTrent Home page

When you first logon to iTrent the Home Page will be displayed:
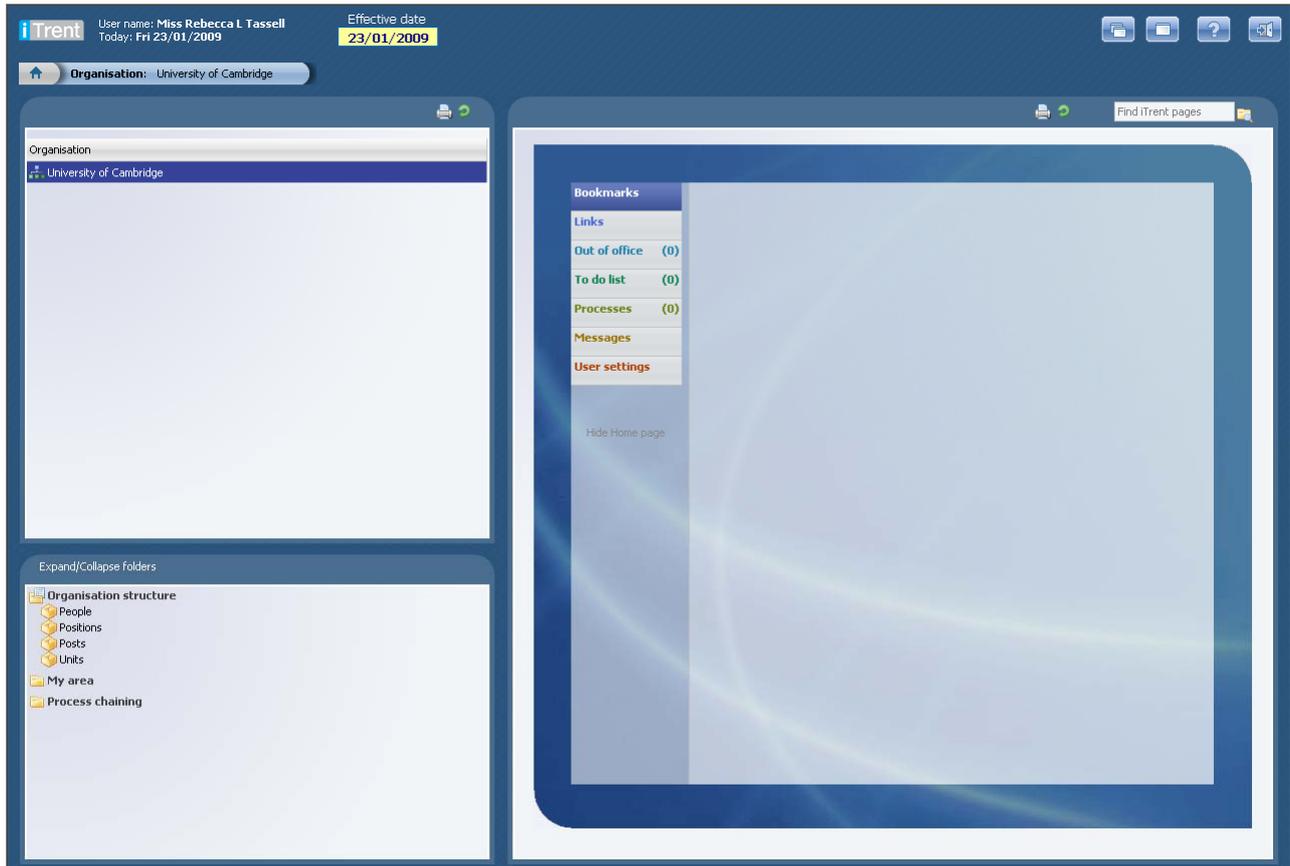
You can return to the Home page at any time by clicking on the Home icon at the start of the navigation trail.

Or

Click the Home page icon which is displayed at the top right of iTrent pages. For example:

The Home page is made up of two areas: the folders list and the detail area

The list of folders and the order that they are presented are controlled by the pages; Link Section, Bookmark folder and Bookmark details which are described later.
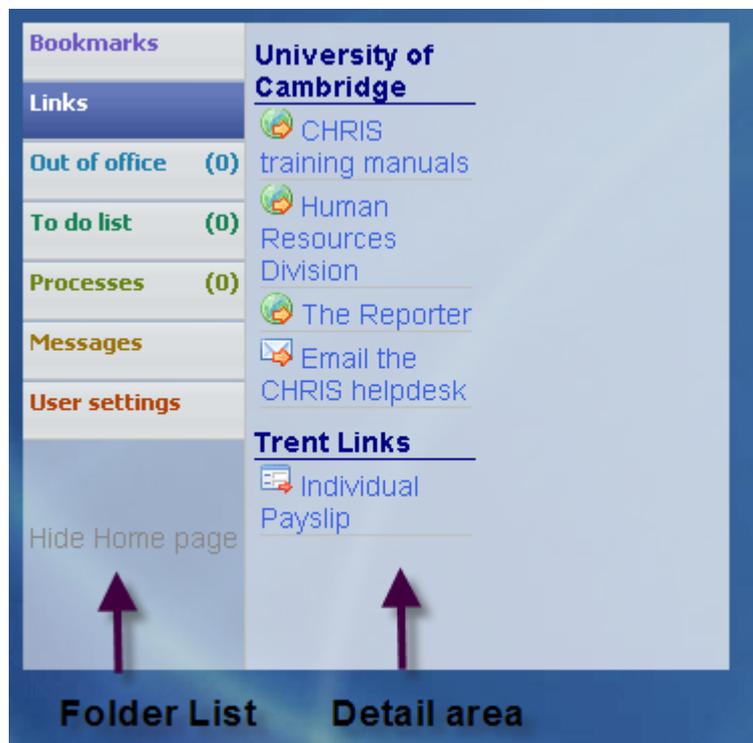
iTrent will always have sections for the To do list, Out of Office, Processes, Messages and User Settings.

You can create your own sections as required which can be configured to hold one of more folders into which you can place iTrent actions, External web site addresses or Email addresses. For example you may create Bookmarks of iTrent pages and have these held in folders.
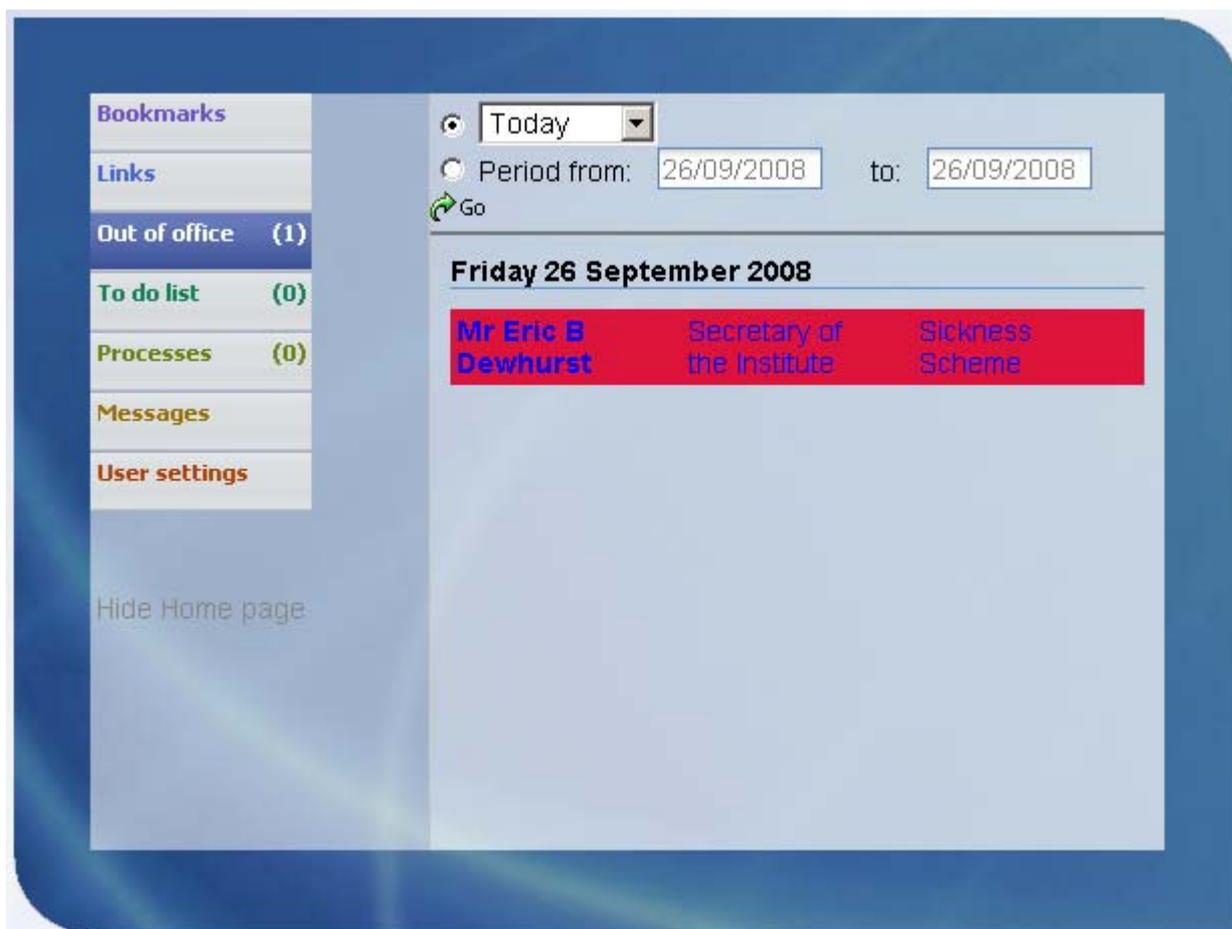
The Home page folder list will also display how many items are requiring your attention. For example:

This example shows that there is 1 person Out of Office today and 1 Process that has been performed.

1.2.1 Out of Office

This section will list all the people from your reportees (those who have you set up as their reporting manager) who have been identified to iTrent as being out of office. The default is set to Today.

People are identified as being out of office by having an Absence recorded in iTrent. Absences are displayed in day of the week order and are colour coded to indicate the type of absence. Each absence lists the name of the person, their position ands the type of absence.

You can modify the display using the controls at the top of the page. The drop down list enables you to select Today, Tomorrow, This week and Next week. Alternatively you can select to display a specific date range using the Period form and to date fields. If you change the selection you should then click the refresh icon to have the data displayed.

Each row displayed is also a hyperlink and when clicked will display the Absence calendar, containing the people in the same unit as the person selected.

1.2.2 Default User Preferences

This page displays user preference settings, some are set as defaults and some can be changed as personal settings.
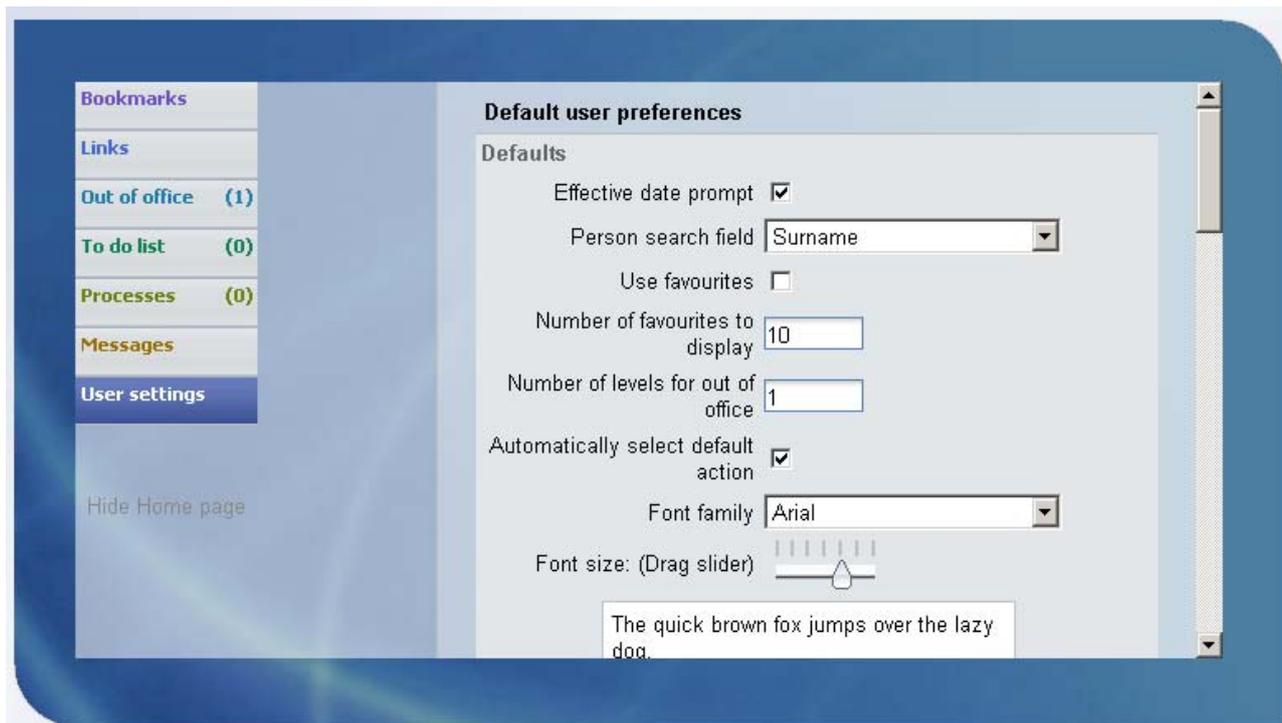
Effective Date Prompt	When ticked you will be prompted every time an effective date is required. It is strongly advised that this setting is ticked.
Person search field	Specifies which item is to be used as the default for people searches.
Use favourites	The default setting is not to use favourites. Menu options for departmental access are restricted to only those of relevance at departmental level. When ticked this option will show the most recently used navigation items rather than the complete list.
Number of favourites to display	Sets the maximum number of your favourites to display.
Font Family	Sets the font to be used.
Font size	Sets the font size
Mandatory Field colour	Sets the mandatory field colour
Show tooltip in searches	Allows summary data to be displayed when the cursor is moved over the search results

1.2.3 Bookmarks

iTrent pages may be bookmarked by clicking the Bookmark icon that is displayed at the top of each page.
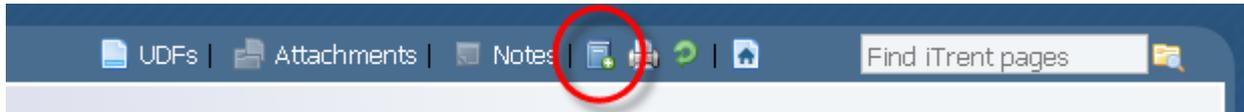
This facility is restricted to pages that you can access via the navigation. The Advanced search page, for example is not available to be bookmarked as it is not a navigation item.

When you click the Bookmark icon the Add link page is displayed which allows you to define the bookmark.

You can bookmark iTrent actions, external web pages and email addresses.

Currently this option is only available to users with update access.

1.3 The iTrent Screen

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

CHRIS – Introduction Guide
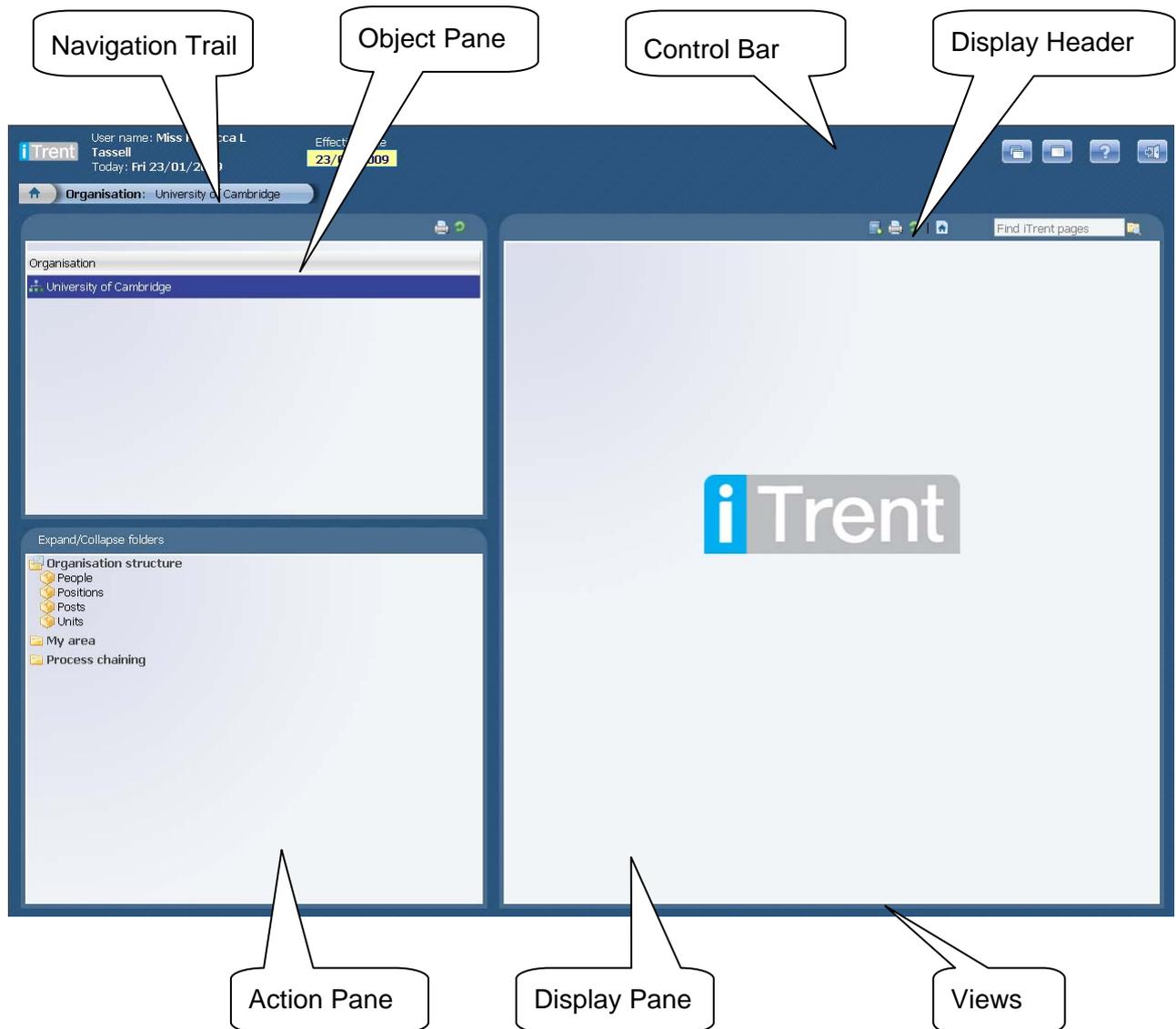
The Control Bar

| iTrent | User name: **Mark Stephens** Today: **Mon 06/10/2008** | Effective date **06/10/2008** | | | | |

| Item	Action	Keyboard Shortcut	Information
User Name			The username you have logged on with
Today			Today's Date
Effective date 01/11/2008	Effective Date	Alt + E	Many of the processing tasks within iTrent require an effective date to be logged. This field allows the user to set the required date before adding or changing a record. In addition it will allow the user to view details 'as at' the date set in the field.
	New View	Alt +N + Enter	When this is clicked a new view is created. The tabs to access the views are displayed at the bottom right of the screen.
	Full View		When this is clicked the Navigation Pane is toggled between being removed or displayed and the Display Pane is expanded to the full screen.
	Help	Alt + H (Enter)	When this is clicked you will be presented with the online help.
	Log Off		When this is clicked you will log off from iTrent. (Note this icon does not appear for users accessing iTrent via Firefox. Firefox users will need to logout by closing the browser window / tab, not by clicking the icon)

1.3.1 Navigation Trail

This bar shows how you navigated to the current location. Each new level creates a new entry in this list. As you make selections in the various panes, the navigation trail will update to indicate the selections you have made. The trail is made up of individual items, each item is split into a header (**bold text**) and contents (normal text).

1.3.2 Object Pane
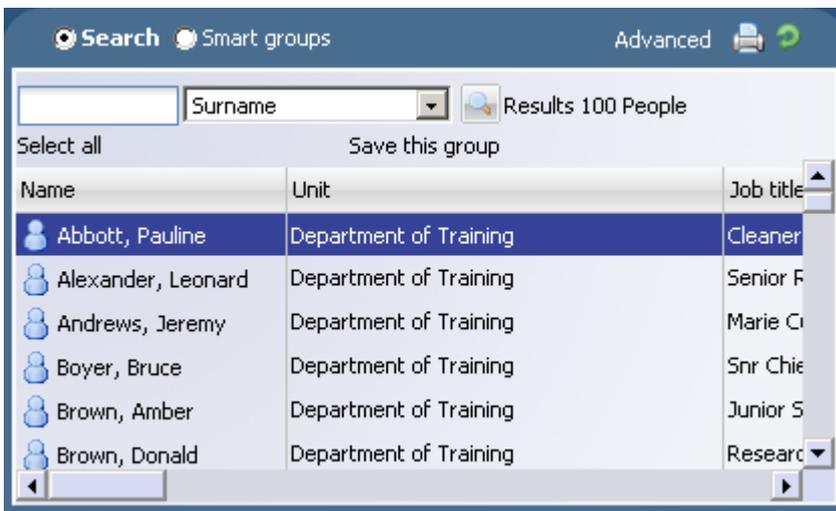
This area displays the objects upon which your actions will be performed. It is also used to hold search results. The actual content of the object pane will depend on previous selections you have made.

You can sort the displayed information of any table by clicking on the required heading.

1.3.3 Action Pane

This area shows you the navigation options that are available to you. These will vary depending upon the current object that is selected and the configuration of your user profile.

Items that have a Sub Folder icon next to them indicate that you will be given further navigation options relating to this level when you click the item.

Items that have a page icon next to them indicate that you will go straight to the relevant page when you click the item.

Items that have a page with a yellow pencil icon next to them indicate that you will go to the relevant page and be able to enter new information when you click the item.

Items that have a folder next to them indicate that a group of items and or pages have been grouped together into a folder. The folder is opened when you click on the item, additional items are then displayed.

1.3.4 Display Pane

This area shows you the details for the selected task. This area will usually display a page where you can display amend or delete data. (Depending on your user profile)

Departmental profiles are currently read only. You cannot update this information.

1.3.5 Display Header

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

Sends the page from the Display Pane and the Objects Pane to the selected printer.

Lists details of any attachments to the page selected in the display pane.

Displays the contents of the notes page associated with the display page.

Displays user defined fields associated with the display page.

These buttons appear coloured when information has been entered

1.3.6 Views

If you click the New View icon, iTrent will create a view for the task you have performed. A view is made up of the navigation trail, object pane and display pane as they were at the time you clicked the new view icon in the control pane.

The tabs to access the views are shown at the bottom right of the Display Pane.

You can create up to 6 views.

This feature will help you perform repetitive tasks that use several action pages or to hold parallel information that you may need to refer to.

Click to the right of the tab to close the view.

1.4 Screen Time out

If there is a period of 1 hour inactivity whilst using iTrent then when you next attempt to access data the following message will be displayed.
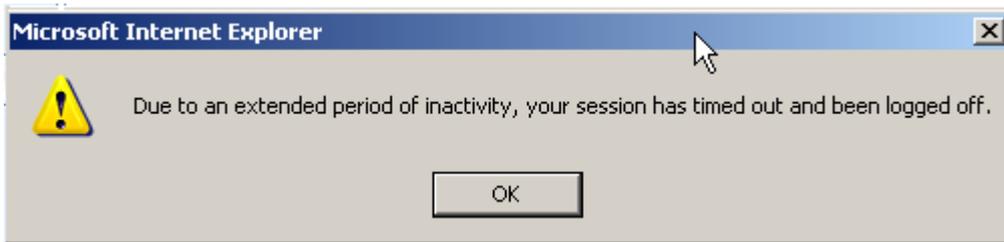
Please note that any unsaved data will be lost.

1.5 Resizing Areas

You can resize the areas of iTrent by moving the cursor to a dividing edge and letting the cursor change into a double arrow. Hold the cursor down and adjust accordingly.
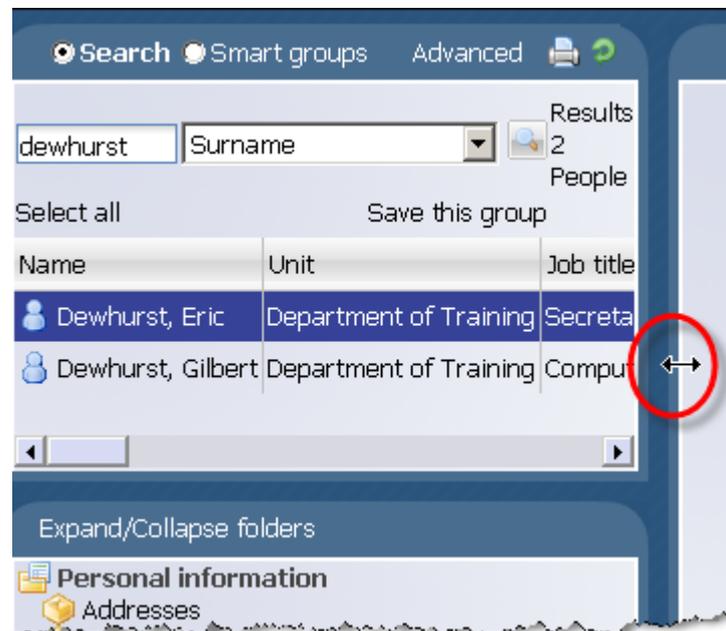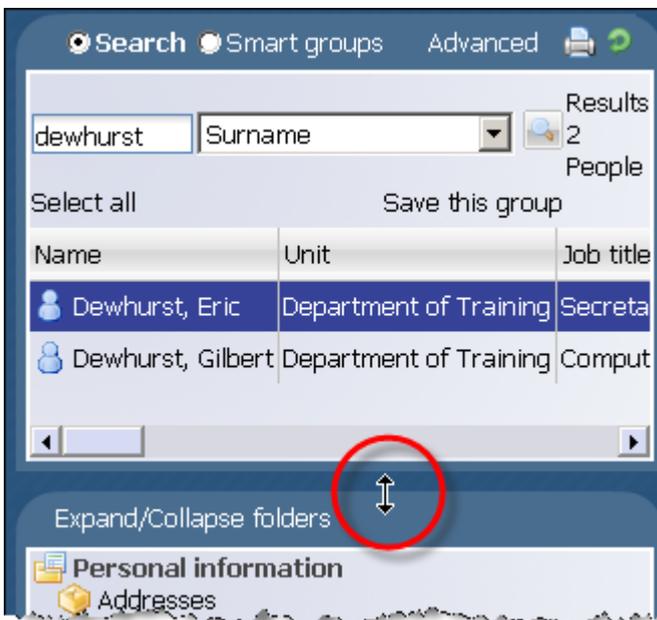
Vertical adjustments will show this cursor:

Horizontal adjustments will show this cursor:

Help and Documentation

1.5.1 Activating Help

On-line help is provided within iTrent. To access help click the help button [?] on the iTrent control bar. iTrent Help cannot be accessed by pressing the F1 key as this will initiate the on-line help for the Internet Explorer Browser.

When you click the Help button the width of the iTrent screen will be reduced from the right and the iTrent on-line help will be started in a separate window next to the iTrent application. If required you can resize or reposition either the iTrent screen or the Help screen as required. When you close the on-line help, the iTrent screen will resize itself back to its original settings.

1.5.2 Controlling Help

The following buttons are available on the help toolbar.

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