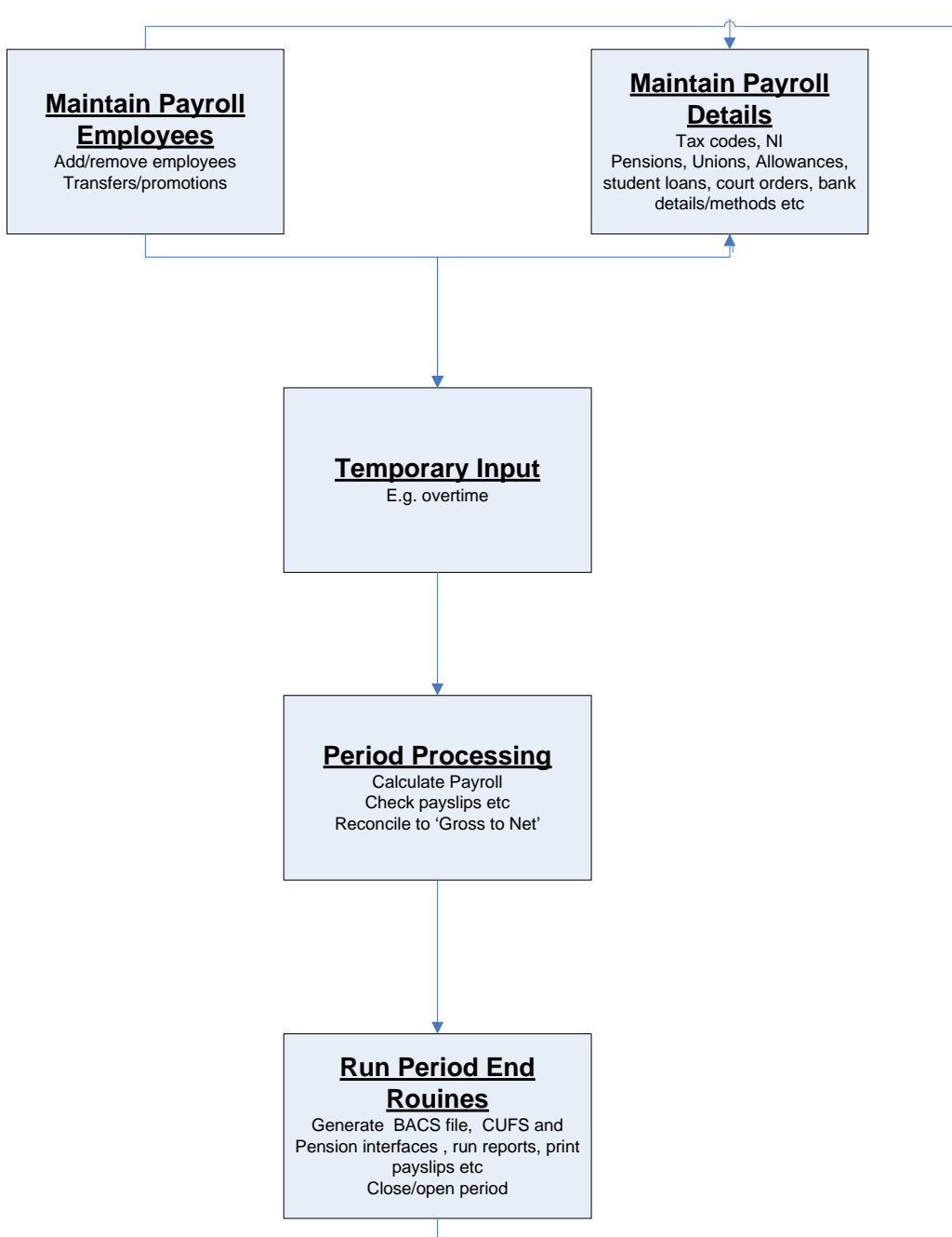# 1 Introduction

1.1 <u>University Payrolls</u>

We have 7 payrolls within the 'University of Cambridge' organisation in Trent:

- Research & Stipends
- Assistants
- Students
- Weekly
- External Monthly (Assistants)
- External Monthly (Misc)
- External Weekly

Within the 'Pensioners' organisation in Trent there are another 2 payrolls:

- P Pensioners (the University's CPS scheme)
- T Pensioners (those in the University's old pension scheme that was the pre-cursor to the USS)

1.2   Overview of monthly cycle

Maintain Payroll Employees		**Maintain Payroll Details**
Add/remove employees Transfers/promotions		Tax codes, NI Pensions, Unions, Allowances, student loans, court orders, bank details/methods etc

Temporary Input
E.g. overtime

Period Processing
Calculate Payroll
Check payslips etc
Reconcile to 'Gross to Net'

Run Period End Rouines
Generate BACS file, CUFS and Pension interfaces , run reports, print payslips etc
Close/open period

1.3   Searching for an employee

Navigate: **Organisation structure > People**

For new starters, once you receive a copy of the New Starter Details form (CHRIS 22) in Payroll, find the new employee by performing a simple search on either their surname or NI number if available.

In order for an employee to be paid they must already have been already attributed to a Unit, attached to a position (and hence a Job title displayed) as well as being attached to the appropriate payroll.
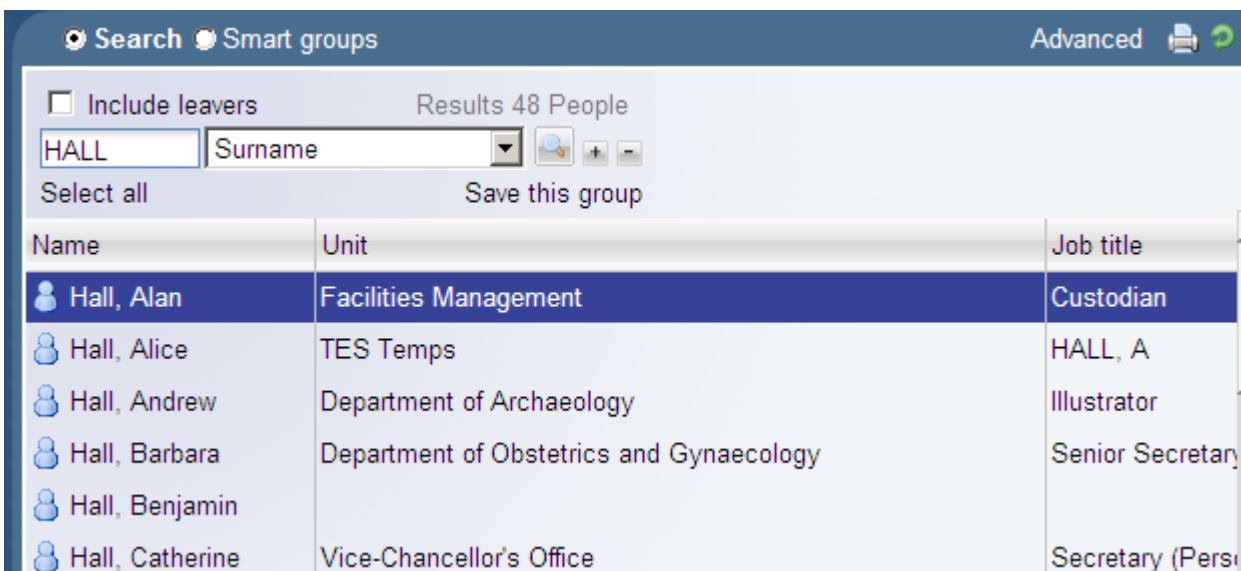
Some individuals have more than one position and great care should be taken to ensure that changes are made to the correct position. If the individual has more than one position then this will be highlighted by an asterix * in between the names of the two roles in the Job Title field.
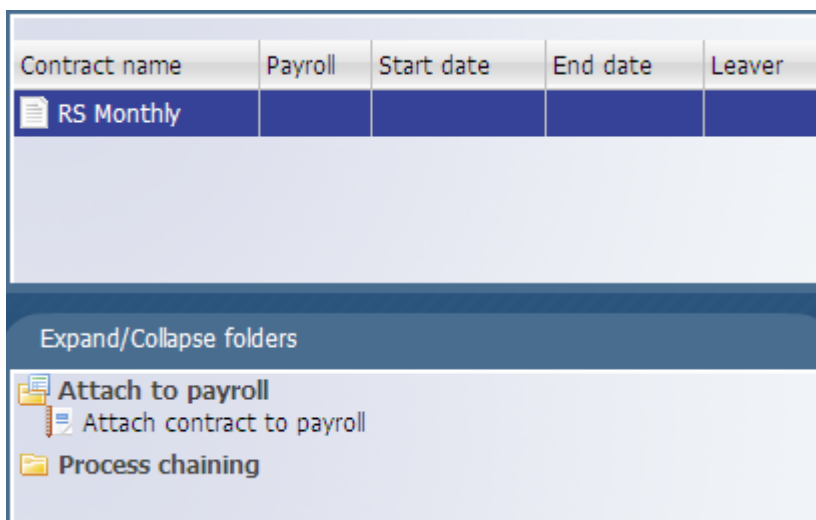
1.4   Attaching to Payroll

Search for the employee, as detailed above
Select the Payroll menu and then attach to payroll

The contract name will be displayed in the top left pane, this will either be RS Monthly, Asst Monthly, Asst Weekly, Students,or Unpaid. Select attach contract to payroll

Select the appropriate payroll from the drop down box

Ensure that the start date corresponds with the start date of appointment on part 2 of the CHRIS/22 form.

1. Click on the Save button.

   Once saved a payroll number will be automatically generated. This will be the same number as the personal reference number.
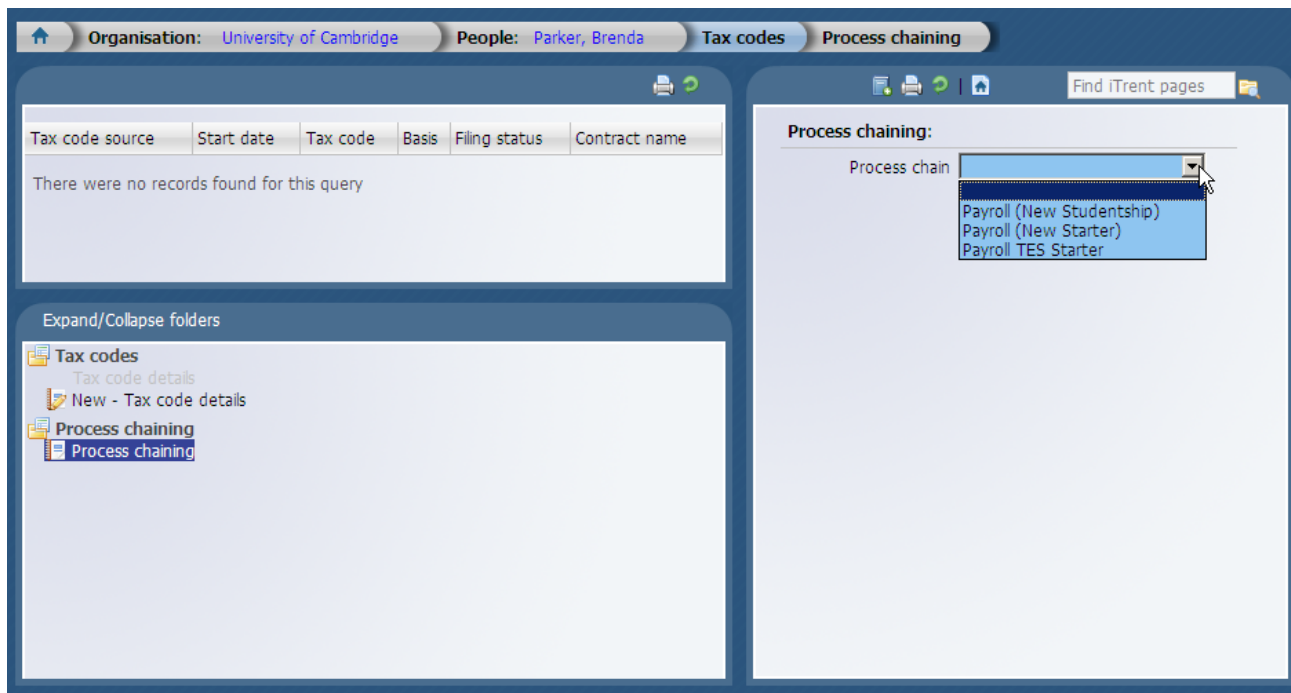
1.5   Process Chains

A process chain will take you through all the different forms that you need to complete/review as part of a particular business process. 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.

1.6   Starting a Process

Each process chain is linked to a particular type of record and is therefore accessed from the appropriate module/menu options So to access a process chain you need to know what the first step of the process is, and navigate to the relevant form on CHRIS.

1.7   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 (and SAVED) you can add other details as required. If you don't need to enter any data to a particular form you can ignore the mandatory fields and move onto the next step.

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.

|	
Important:	Always **SAVE the first step** of the chain, even if the first screen is a '..details' one where you have just reviewed previously entered data and don't need to make changes.

1.8   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 menu option on the Home page
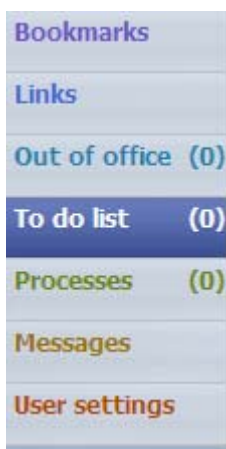
2. This will display items in your To do list.
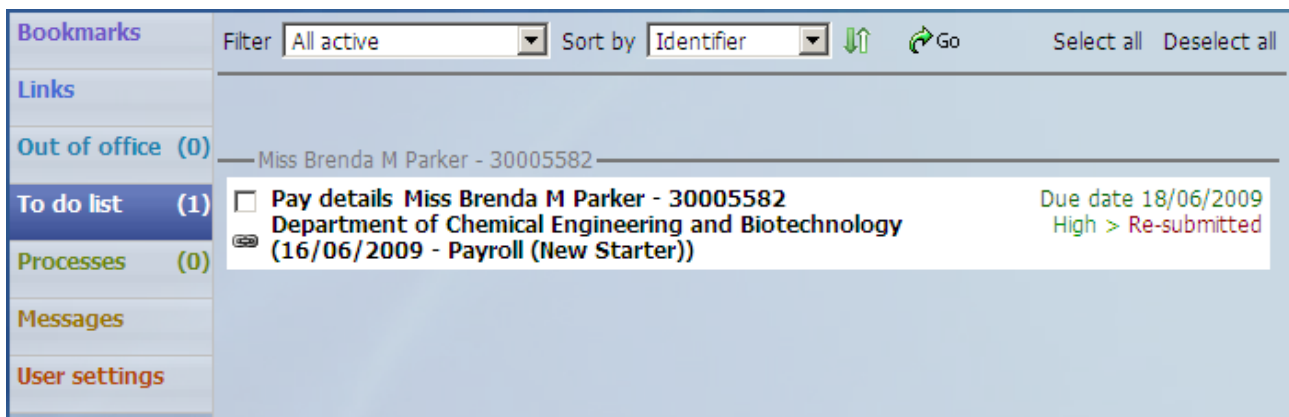
3. Click on the process you would like to continue. Trent will open the Process Chain at the place indicated at the top of the task details. Note, this is normally the next step in the chain, so navigate back using the back arrow.