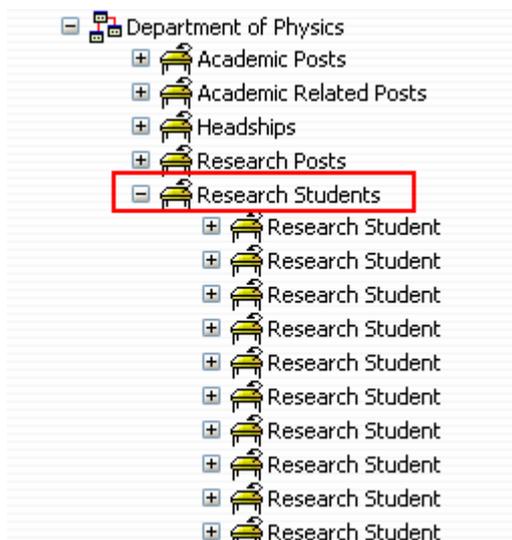

1	Studentships	2
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1 Studentships

Studentships are a means of providing postgraduate funding for postgraduate students. Funds could be made available from research councils, institutions, faculties or departments, named awards or hardship funds. Students who receive such funds need to be set up within a post and position so that they can be 'paid' their funds. A New Studentship Form - CHRIS/30 will be completed for studentships. Students are attached to a separate 'student' payroll.

1.1 To set up a studentship post

1. Select the University of Cambridge Organisation
2. Enter the correct effective date for the start date of the studentship – this is question 1 of the New Studentship form – CHRIS/30.
3. Click Units in the Action Pane and then use the search facility  Search to locate the required department.
4. Open the Mini Explorer
5. Select the level 1 post of Research Student within which you wish to create the new Research Student post



6. Click the create Post option in the Action Pane
Trent opens the Create linked item page in the display pane

Create linked item:

Name	<input style="width: 90%;" type="text" value="Research Student"/>
Quantity	<input style="width: 90%;" type="text" value="1"/>

7. Enter name of Research Student and quantity of 1

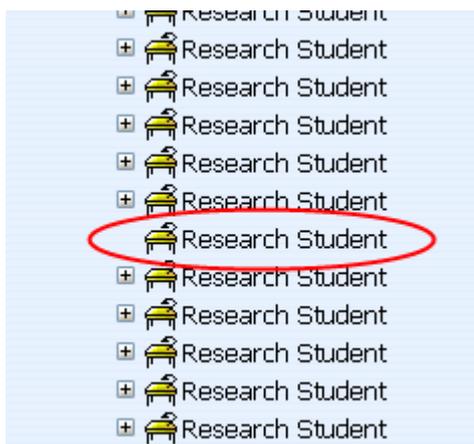
8. Click the  button.

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

1.2 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.

9. Select the new post in the object pane. The new Research Student post will be the one without a position, and hence will be displayed without the expand icon to the left of it. You may need to scroll down the list of Research Students to locate it.



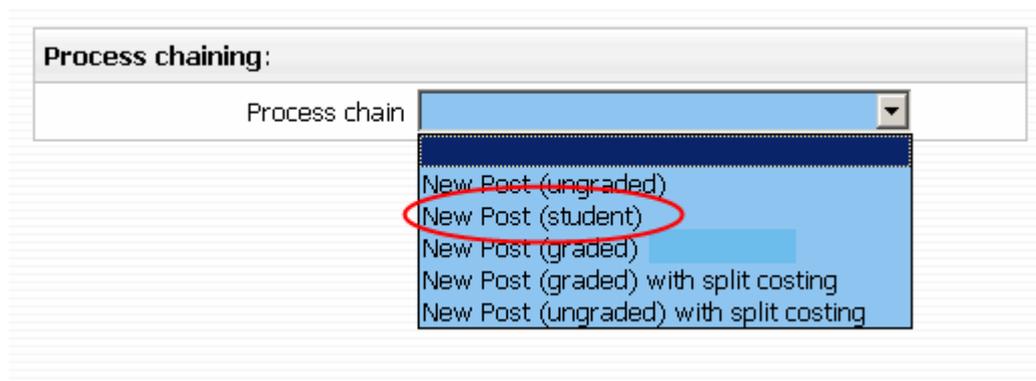
10. Choose post details and record the post reference number.

Post details: research student	
Post	Research student
Start date	01/03/2007
End date change?	<input type="checkbox"/>
End date	
Post reference	50000059
Current status	Live
Job share	<input type="checkbox"/>
Suspend from	<input type="text"/> 
Suspend to	<input type="text"/> 
Probationary period	<input type="text"/> <input type="text"/>  II
Location	<input type="text"/> II
Structure group 1	School of the Biological Sciences  II
Structure group 2	<input type="text"/> 
Third party return details	
Teacher	<input type="checkbox"/>

2 Student Post Details

Once the new post has been created you will need to add further details.

There is a specific process chain for Student posts



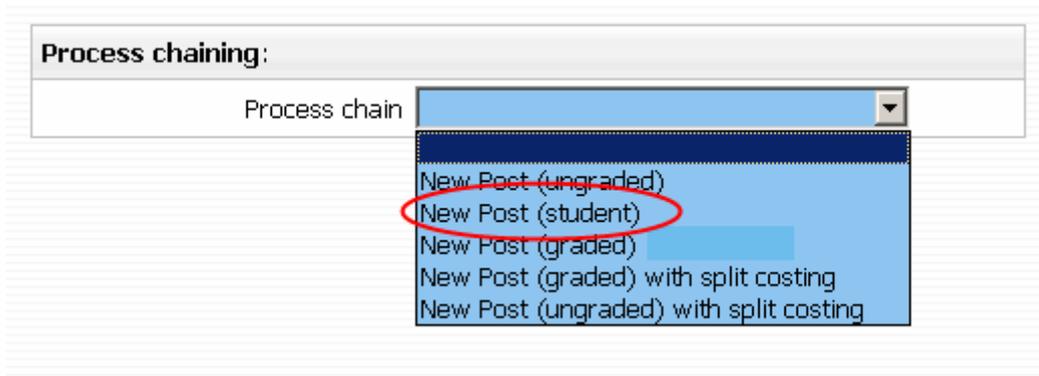
The New Post (student) chain encompasses many of the Trent forms that allow you to add key data to newly created posts. The following diagram shows the forms encountered in the chain.

2.1 Creating a New Post (student)

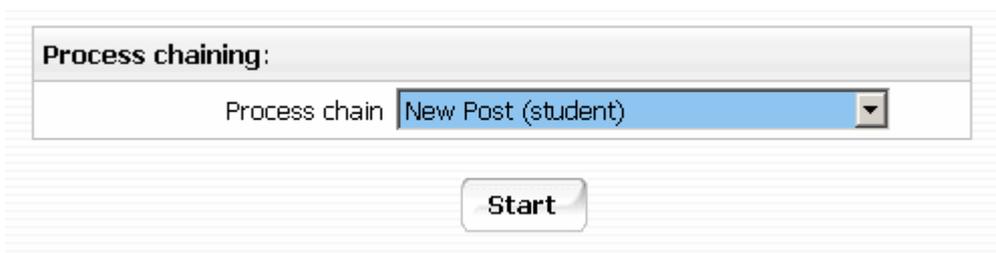
1. Select the new Student post to be maintained
2. Select the Process chaining menu from the Action pane



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



5. Select New Post (student) and click on the Start button to commence the process.



6. The first step will then be presented (Post details)

Step 1 of 4
Chain: New Post (student)


Post details: Research Student

Post	Research Student
Start date	01/04/2007
End date change?	<input type="checkbox"/>
End date	
Post reference	50000055
Current status	Live
Job share	<input type="checkbox"/>
Suspend from	<input type="text"/> 
Suspend to	<input type="text"/> 
Probationary period	<input type="text"/> <input type="text"/>  II
Location	<input type="text"/> II
Structure group 1	School of the Physical Sciences  II
Structure group 2	<input type="text"/> 

Third party return details

Teacher

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

 Changes have been saved.

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

2.1.1 Salary Details

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

Step 2 of 4
Chain: New Post (student) 

II Salary details : Research Student

Grade

FT Salary

Override minimum

Override maximum

Grade minimum

Grade maximum

Protected rate of pay

FTE value 1.00

Pro-rated rate of pay 0.00

Change reason

2. Enter grade of Student

Step 2 of 4
Chain: New Post (student) 

II Salary details : Research Student

Grade

- Enter the amount of the studentship payment – Section C of the New Studentship form, and click the drop down arrow to select annual.

FT Salary	<input type="text" value="18000"/>	<input type="button" value="v"/>
Override minimum	<input type="text"/>	<input type="button" value="v"/>
Override maximum	<input type="text"/>	<input type="button" value="v"/>
Grade minimum	<input type="text"/>	<input type="button" value="v"/>
Grade maximum	<input type="text"/>	<input type="button" value="v"/>
Protected rate of pay	<input type="text"/>	<input type="button" value="v"/>

Daily
 Weekly
 Fortnightly
 Lunar
 Monthly
 Quarterly
 Half Yearly
Annually
 Hourly
 Periodic

- Click the  button.

Step 2 of 4 Chain: New Post (student) 

 **Salary details** : Research Student

Grade

FT Salary

Override minimum

Override maximum

Grade minimum

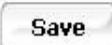
Grade maximum

Protected rate of pay

FTE value 1.00

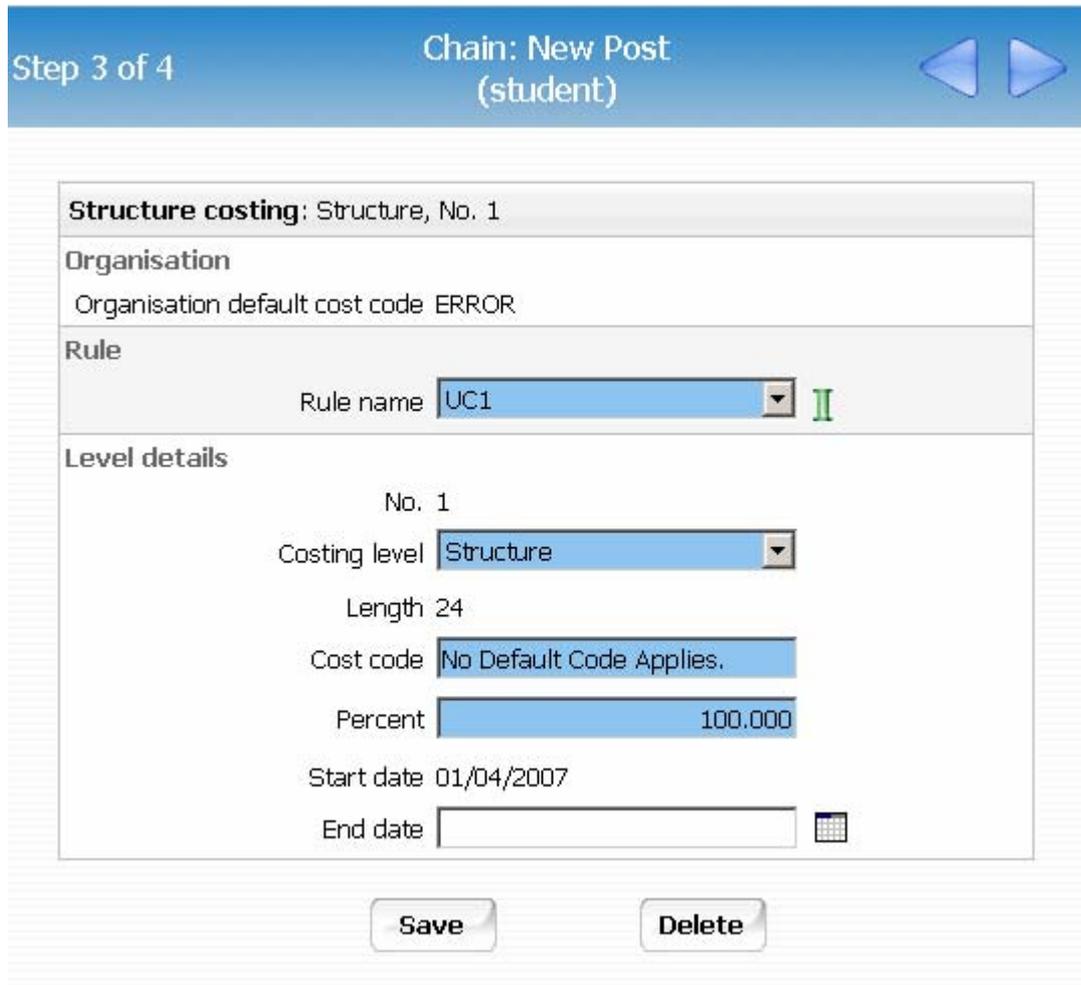
Pro-rated rate of pay 18,000.00

Change reason




2.1.2 Structure Costing

1. Click on the next step button, this will take you to the form to enter the Structure Costing information.



Structure costing: Structure, No. 1

Organisation
 Organisation default cost code ERROR

Rule
 Rule name UC1

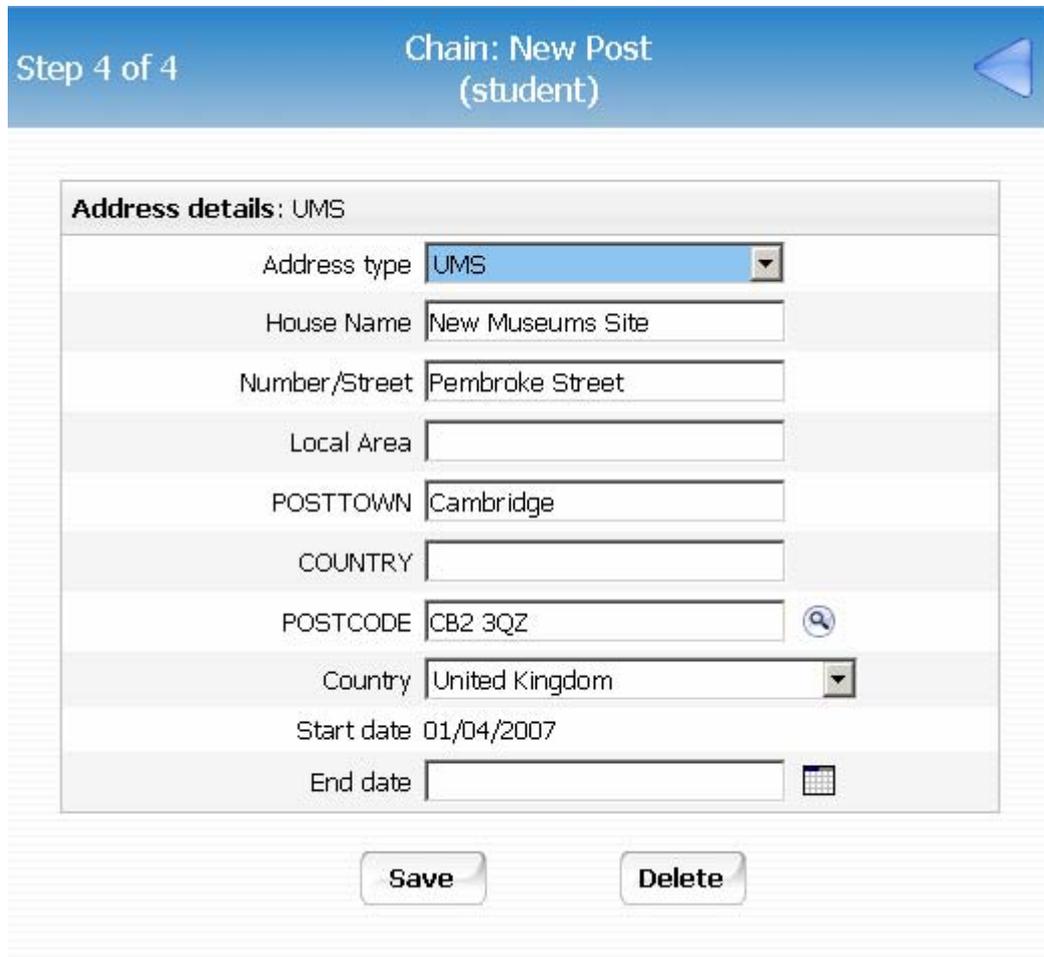
Level details
 No. 1
 Costing level Structure
 Length 24
 Cost code No Default Code Applies.
 Percent 100.000
 Start date 01/04/2007
 End date

Save Delete

2. Replace “No default code applies” in the Cost Level field, with the relevant string in the “Cost code” field. The transaction code for students is FAAE. 100 will automatically be entered in the “Percent” field.
3. Click the  button.

If the studentship has split costing, complete this step with costing details of the first cost code at 100% and then when the screen chain is complete use the split costing option in the Costing menu. See instructions on Split Costing.

1. Click on the next step button, this will take you to the form to enter the Address information.



2. Check that the inherited address is correct. If the place of study on section D of the CHRIS/30 form for this post is not the normal Departmental address change the address as required.
3. Click the  button.

Use the navigation trail to exit the screen chain and return back to the post.

2.1.3 Split costing

1. If the studentship has split costing, you need to click the Structure Costing option in the Costing folder,



and then select split.



Costing level	Length	Cost code	Perce
Structure	24	PHZC/033.01.RG46383.FAAE	100.

Select all

Expand/Collapse folders

- Structure costing
 - Structure costing
 - Split**
 - New - Structure costing
 - Inheritance chart
 - History
- Process chaining

Structure costing: New

Organisation
Organisation default cost code ERROR

Rule
Rule name UC1

Level details
No. 2
Costing level Structure
Length 24
Cost code
Percent
Start date 01/04/2007
End date

Split records

No.	Cost code	Delete?	Percent
No.1	PHZC/033.01.RG463	<input type="checkbox"/>	100.000

- Enter the details for the second code and percentage and adjust the percent for the first code in the box called "Split records". The total % must be 100 at all times. (The cost code entered via the screen chain will be displayed in the split records section)

Structure costing: New

Organisation
 Organisation default cost code ERROR

Rule
 Rule name UC1

Level details
 No. 2
 Costing level Structure
 Length 24
 Cost code U.PH.PHQM.EFKM.FAAE.0000
 Percent 80
 Start date 01/04/2007
 End date

Split records

	Cost code	Percent
No.1	PHZC/033.01.RG463	20
	Delete?	<input type="checkbox"/>

- Click the  button.

If a three or more way split is required, split two ways first, then split the second costing and so on. (You cannot split the first costing again)

3 Creating a student position

1. With the research post selected open the mini explorer and choose the Create Position option in the Action Pane. Trent opens the Create linked item page in the display menu.

Create linked item:

Name	<input style="width: 90%;" type="text" value="Research Student"/>
Quantity	<input style="width: 90%;" type="text" value="1"/>

2. Enter name of Research Student and quantity of 1
3. Click the button on the create linked item page to save your changes. Trent adds the new Position to the Organisation Structure and the explorer diagram is updated accordingly.



3. View and record the position reference number

Position details: Research Student	
Job title	Research Student
Start date	01/03/2007
End date change?	<input type="checkbox"/>
End date	
Position reference	70000029
Probationary period	<input type="text"/> <input type="text"/> II
Location	<input type="text"/> II
Occupant	Vacant
Reporting unit	Department of Pharmacology
Reports to	Research Student  Mr Michael Clynes (01/03/2007 -)
Expected position end date	<input type="text"/> 
Expected position end reason	<input type="text"/>
Structure group 1	School of the Biological Sciences II
Structure group 2	<input type="text"/>
Position status	
Position status	<input type="text"/>
Third party return details	

4. Enter the expected position end date.

Expected position end date	<input type="text"/> 
----------------------------	--

5. Click the  button.

4 Setting up a new Student person record

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.

4. If the person is not found by surname, perform another search by date of birth to establish they are not already added.

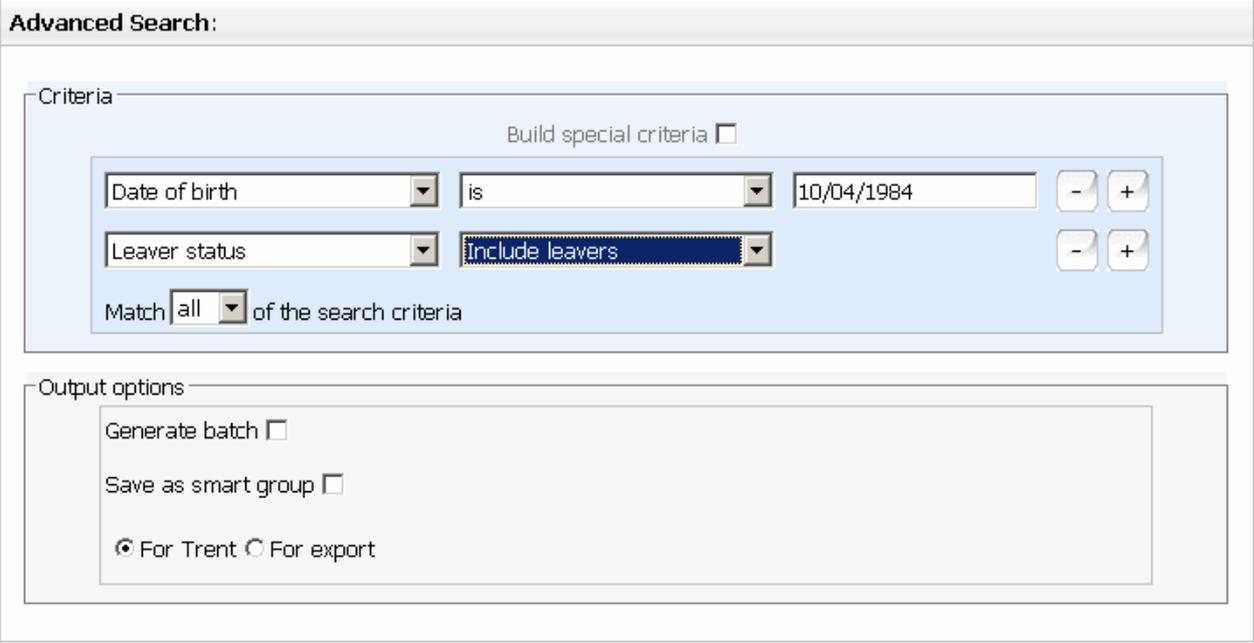
Remember if you use the advanced search, for instance to perform a search by date of birth, you must select "include leavers".



Name	Unit	Job title	Sex	Date of birth	Social security no.	Persona
------	------	-----------	-----	---------------	---------------------	---------

Click on the Advanced button

Enter the first criteria – in this example date of birth of the new person to be created and click on  to enable you to enter additional criteria. Click the drop down arrow and choose leaver status and select include leavers.



Advanced Search:

Criteria

Build special criteria

Date of birth is 10/04/1984

Leaver status Include leavers

Match all of the search criteria

Output options

Generate batch

Save as smart group

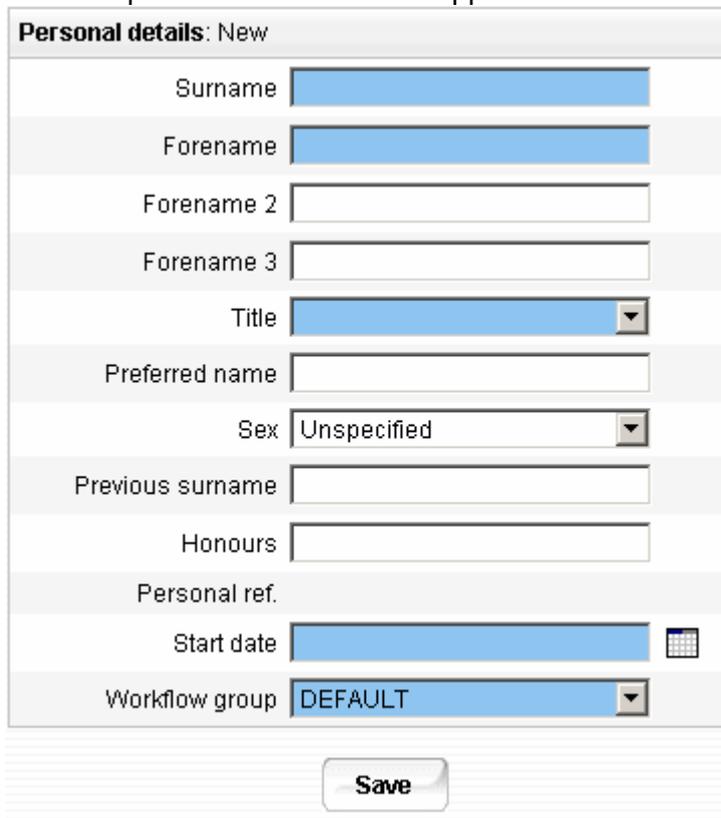
For Trent For export

Search

5. Click on the  button

If the person does not already exist on the system, continue to step 6.

6. Select  New - Personal details menu from the Action Pane. The new person details form will appear.



Personal details: New

Surname

Forename

Forename 2

Forename 3

Title

Preferred name

Sex

Previous surname

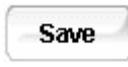
Honours

Personal ref.

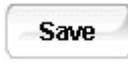
Start date 

Workflow group

Save

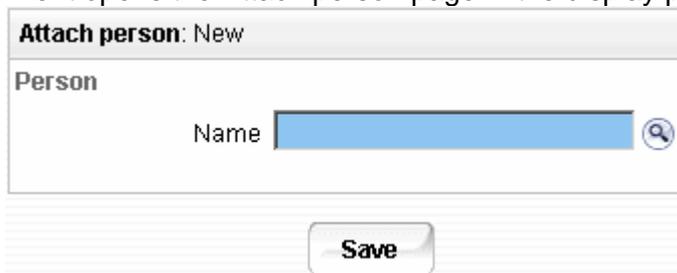
7. Key in the surname, first name, first name 2, first name 3 if applicable.
8. Click the drop down list arrow and select a title.
9. Enter sex, and organisation start date. Leave workflow group to Default.
10. Click the  button
The record will be saved and the new person's details will be displayed in the object pane.
11. 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. There is a "Personnel use only" section on page 2 of the CHRIS/30 form on which to do this.

4.1 Key Date Details

1. Select  Key date details from the Action Pane
The key date details form will be displayed
2. Enter Date of Birth, but DO NOT enter a retirement date or a reckonable service date.
3. Click the  button.

5 Attaching a Person to a Student Position

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 person, 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.



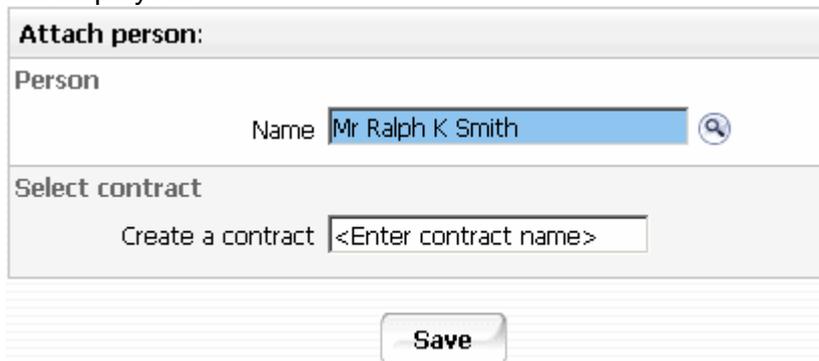
Attach person: New

Person

Name 

Save

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.



Attach person:

Person

Name 

Select contract

Create a contract

Save

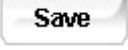
6. Don't enter anything in the Create a contract field, this will create a contract with the same name as the position
7. Click the  button.

5.1 Occupancy Details

As a student is appointed to a position temporarily you also need to enter an occupancy end date.

1. With the person and position visible in the navigation trail, select position details and then occupancy details
2. Enter the expected occupancy end date.

Occupancy details: Research Student (No permission status)	
Current status	Live
Occupant	Miss Joy Sumner
Occupancy start	01/10/2004
Occupancy end	
Occupancy type	Standard
Position occ. reference	40002363
Expected occupancy end date	30/09/2007
Expected occupancy end reason	
End occupancy?	<input type="checkbox"/>

3. Click the  button.

6 Attaching a student to the student payroll

Once the relevant student details have been added and attached to the organisation, via the Research Student position, the student will need to be attached to payroll. This is achieved through the Attach to the Payroll option.

1. 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.
2. Select the Payroll menu, and then attach to payroll option
3. Choose attach contract to Payroll
4. Click the drop down arrow to the right of Payroll and select the Student payroll.

Attach to payroll	
Payroll	<input type="text" value="Payroll"/>
Start date	<input type="text"/>
Contract name	<div style="border: 1px solid black; background-color: #e0e0e0; padding: 2px;"> <ul style="list-style-type: none"> Assistants External Monthly (Asst) External Monthly (Officers) External Weekly Research & Stipends Students Weekly </div>
Legislation	<input type="text"/>
Detach from payroll	

5. Enter the start date when this contract is to be attached to payroll.
6. Click the  button.
7. 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