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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

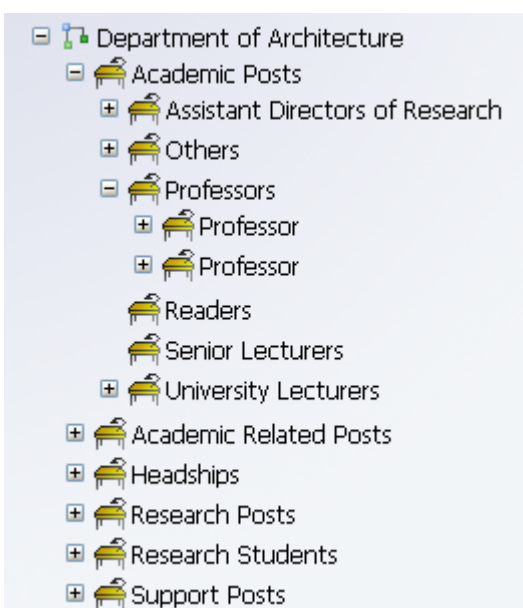


A unit is an organisation structure component that is made up of subordinate components including other units and posts. For example Colleges are a unit and each individual college – Christ's, Churchill, - a unit within this main unit.

Post



Within the Faculties and Departments are Posts. There are three levels of posts within the structure.



This screen displays the Department of Architecture

Level 1 posts are Academic, Academic Related, Headships, Research, Research Students and Support

Level 2 posts are shown below this – Assistant Directors, Others, Professors, Readers, Senior Lecturers, University Lecturers

Level 3 posts are the 2 Professor Posts that exist within the Classics Faculty

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 (no red chairs are visible at present)

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

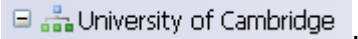
2 Explorers

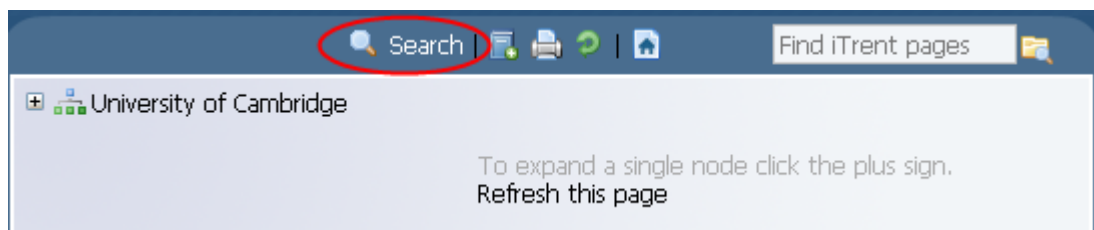
There are two explorers that you can use. The Organisation Explorer and the Mini Explorer.

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.

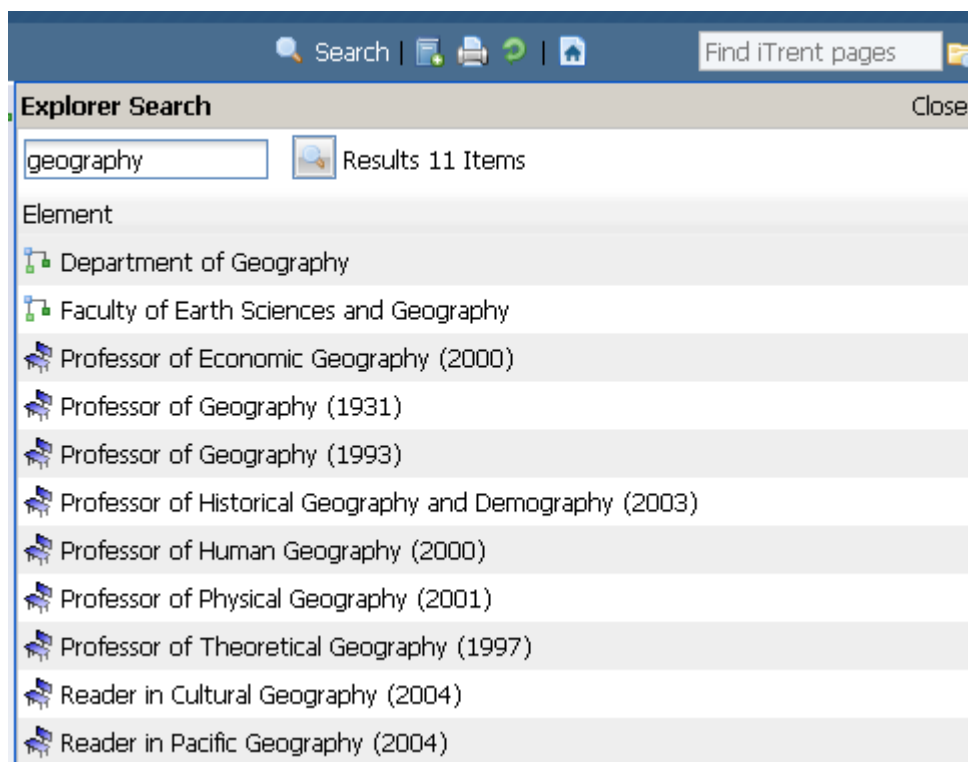
2.1 Organisation Explorer

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. Enter the correct effective date.
4. 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.
5. Click on the search button to enter the faculty or department you wish to locate.






For example entering “Geography” will return search results as displayed below



6. Select the required Faculty or Department.

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.



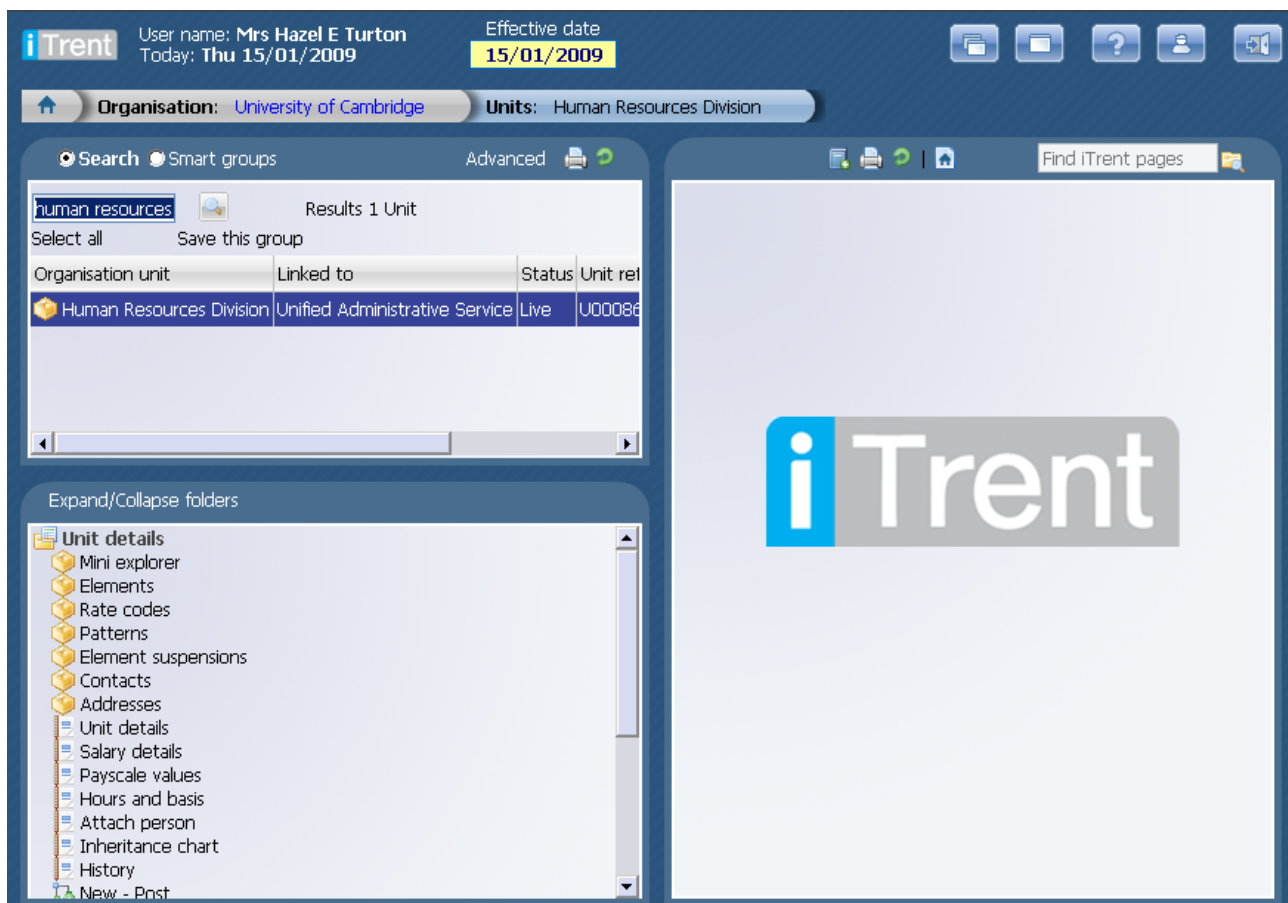
It is suggested that you use the Organisation explorer only to identify an area of the University structure to initialise a search procedure. To add or maintain items search for the unit, post or position and click the Mini explorer link in the action pane.


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.

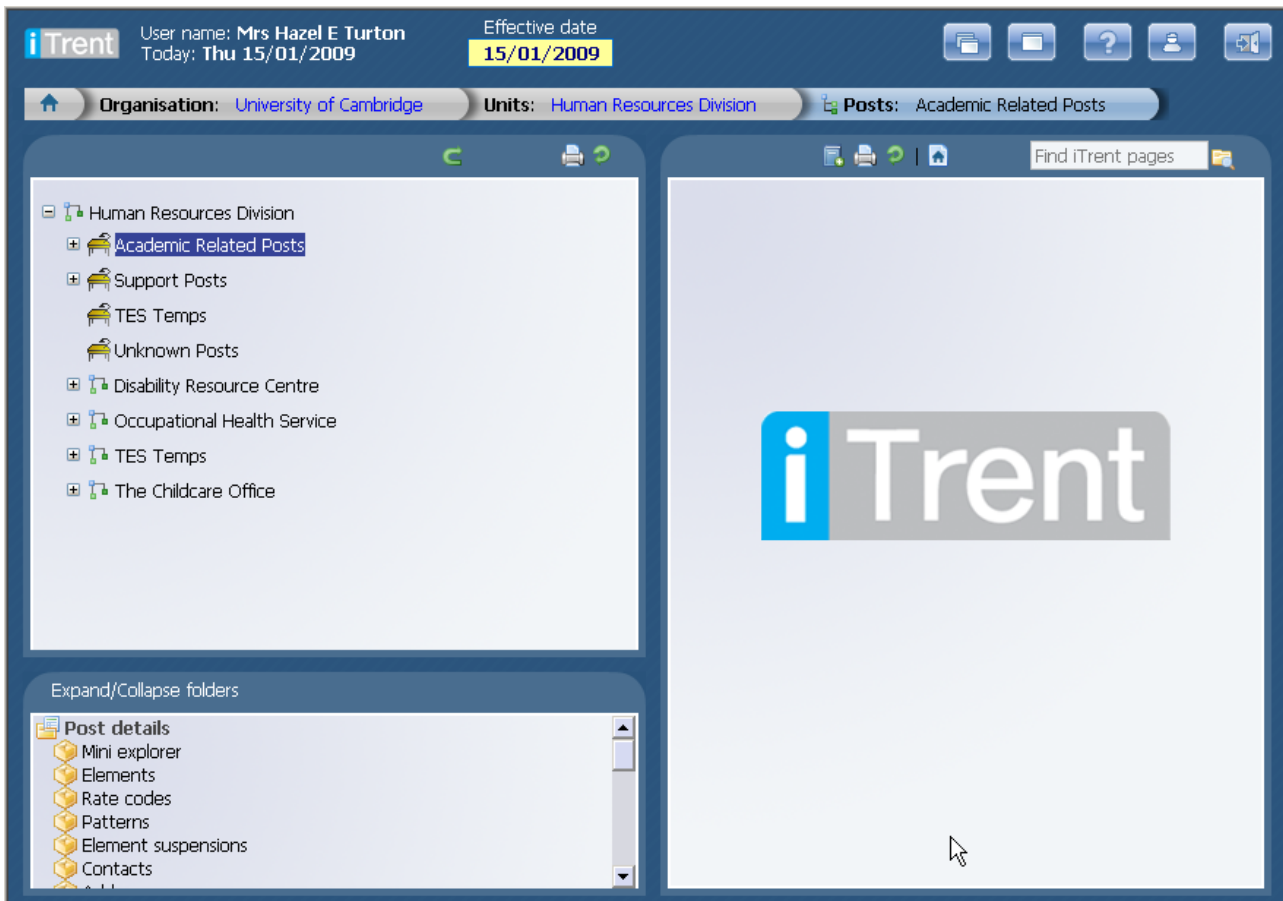
The mini explorer options are available for each of the different components that make up the structure (Units, Posts and Positions), and can be accessed in the relevant folder.



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.

3 Post and Position Menus

The position details menu displays information specific to the individual employee who occupies a position.



The Payscale values form shows the grade and scalepoint for the employee.

Occupancy details shows expected occupancy end date, for example where an employee is limited by their work permit expiry date.

Hours and basis shows the number of hours that the employee is contracted to work.

Addresses shows the UMS address at which the employee works.

Each position is attached to a post and the post details menu displays information specific to the post and the conditions that a position should go back to when an occupant leaves.



The Payscale values form shows the grade of the post, but no scalepoint as this is individual to the occupant.

Hours and basis shows whether it is a full time or part time post. A post may show as full time, but position details could show that the employee occupying the position is working less hours.

Addresses shows the UMS address for the faculty or department. The position details address may be different where the occupant is located in a different place of work.

4 Creating a Post

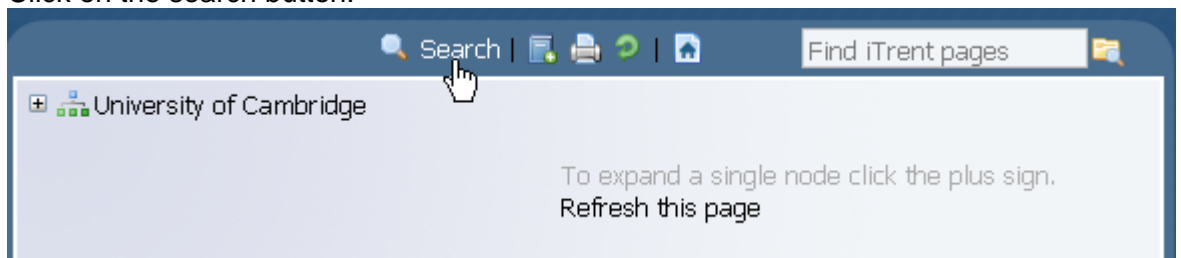
All new Posts within the University, which are permanent or temporary, will be entered on to the CHRIS system by staff within Central Personnel based upon the details provided on the 'Grading and New Post Request Form' - CHRIS/1, 'New Academic Post Request Form - CHRIS/2, New Appointment Request Form- CHRIS/10 or New Short-Term (ungraded) Appointment – CHRIS/11

Posts are an intermediate part of the organisation structure.

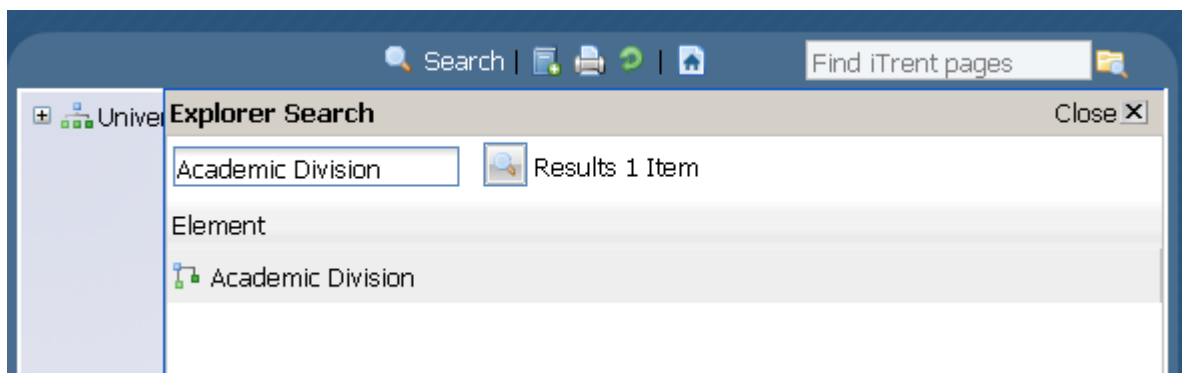
A post always belongs to an organisation unit. Within Cambridge we have allocated different staff groups to posts and this is displayed as a three level structure of posts within Trent.

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

1. Within the University structure there will always be one post visible for each position (with the exception of certain academic promotions.)
2. With the University of Cambridge selected, click on Organisation explorer.
3. Enter the correct effective date for the start date of the post. This should be the date of the PD33.
4. Click on the search button.



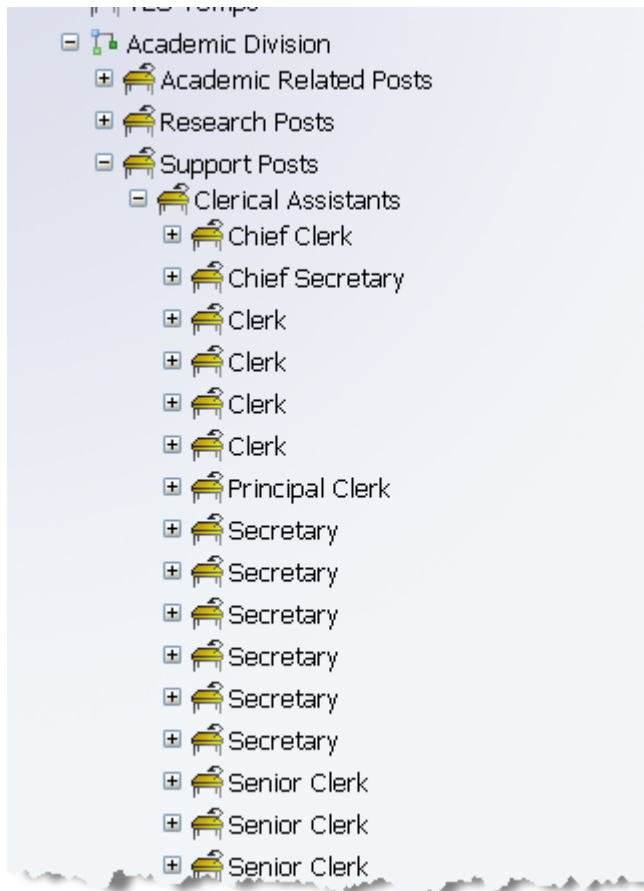
5. Enter the Faculty or Department you wish to search for



6. Select the Faculty or Department and let the system drill down to find it and select.
7. Click on the expand icon.



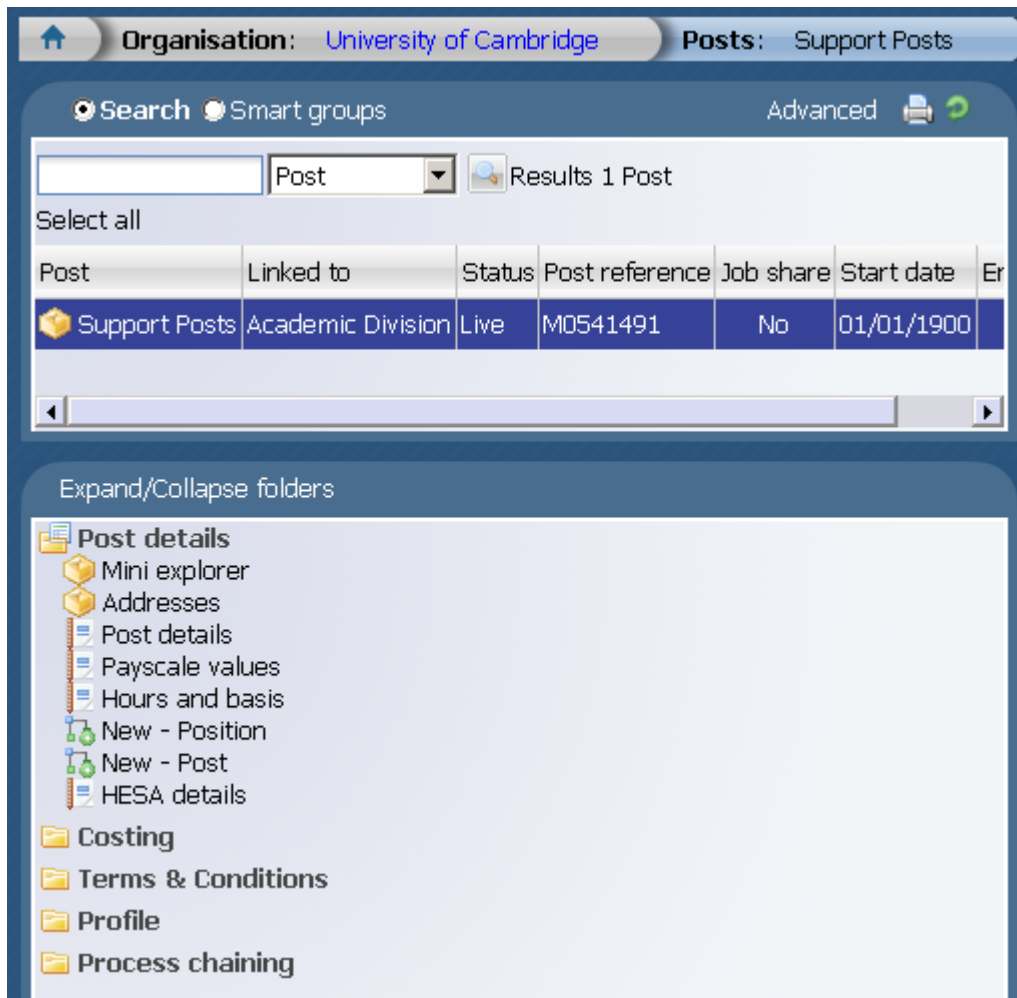
8. Continue to expand to find the post within which you are creating the new post.



9. Select the level 1 post.

In this example a new Senior Clerk Post is being created. The level 1 post is Support Posts, the level 2 post is Clerical Assistants. Support Posts is selected.

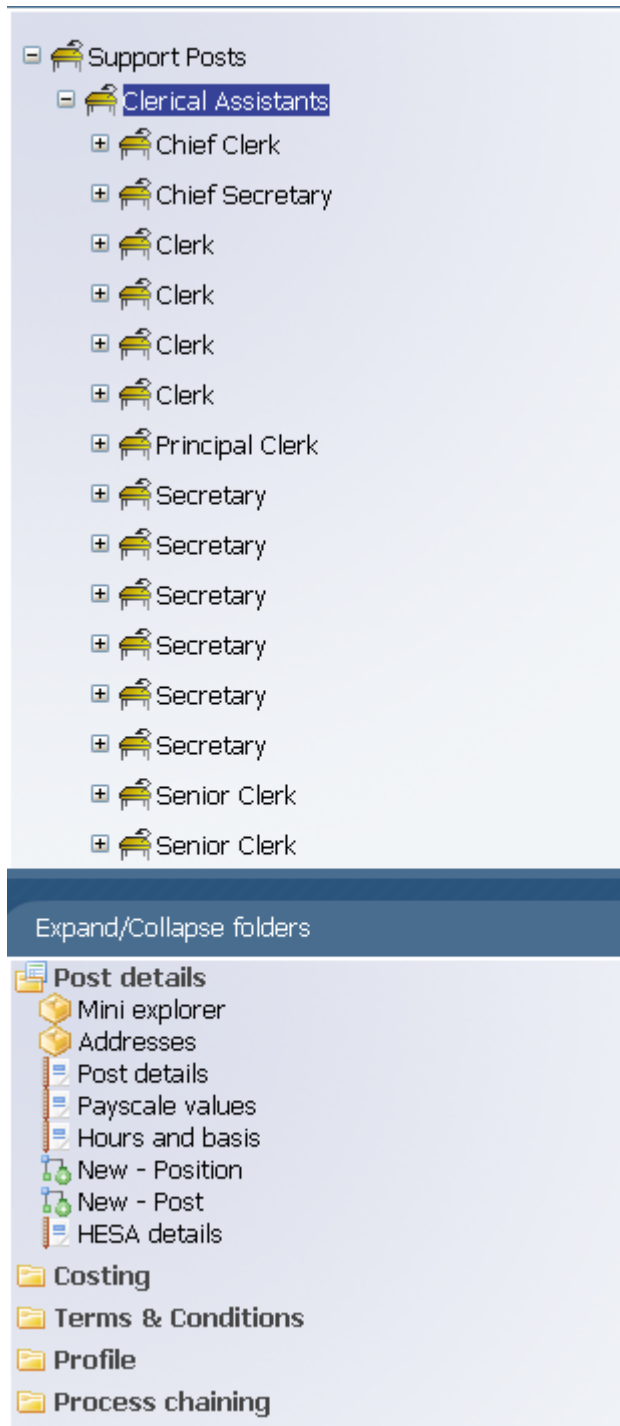
10. The post will appear in the object pane



11. Open the Mini Explorer




12. Select the Post within which you wish to create the new post. The Post details menu will be displayed.



13. Ensure that the correct level post is highlighted – this should be the post above which you are creating the new post. Click the Create Post option in the Action Pane. Enter the correct effective date for the new post. Trent opens the New - Post page in the display pane

14. Enter the name for the new Post

15. The Quantity of 1 will automatically be entered

16. Click the  button on the Create linked item page to save your changes. A changes have been saved message will appear briefly and iTrent adds the new Post to the Organisation structure and the explorer diagram is updated accordingly.

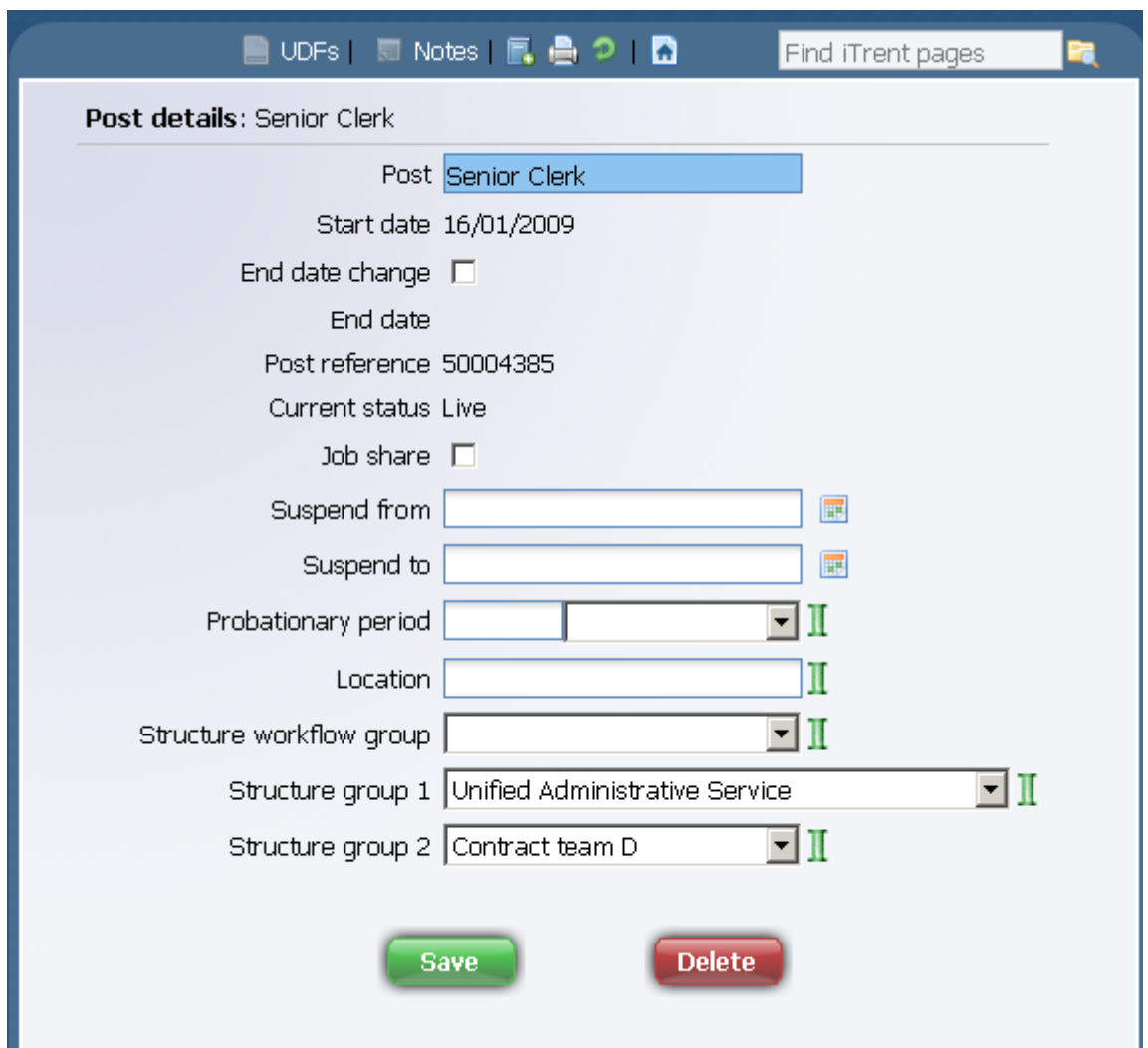
The new Post can easily be identified as it will not have an expand icon to the left of it.

-   Senior Clerk
-   Senior Clerk
-   Senior Clerk
-   Senior Clerk
-   Senior Clerk
-  Senior Clerk
-   Senior Clerk

4.1 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.



The screenshot shows the 'Post details' form for a 'Senior Clerk' position. The form includes the following fields and options:

- Post: Senior Clerk
- Start date: 16/01/2009
- End date change:
- End date: (empty)
- Post reference: 50004385
- Current status: Live
- Job share:
- Suspend from: (empty)
- Suspend to: (empty)
- Probationary period: (empty)
- Location: (empty)
- Structure workflow group: (empty)
- Structure group 1: Unified Administrative Service
- Structure group 2: Contract team D

At the bottom of the form, there are two buttons: 'Save' (green) and 'Delete' (red).

5 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:

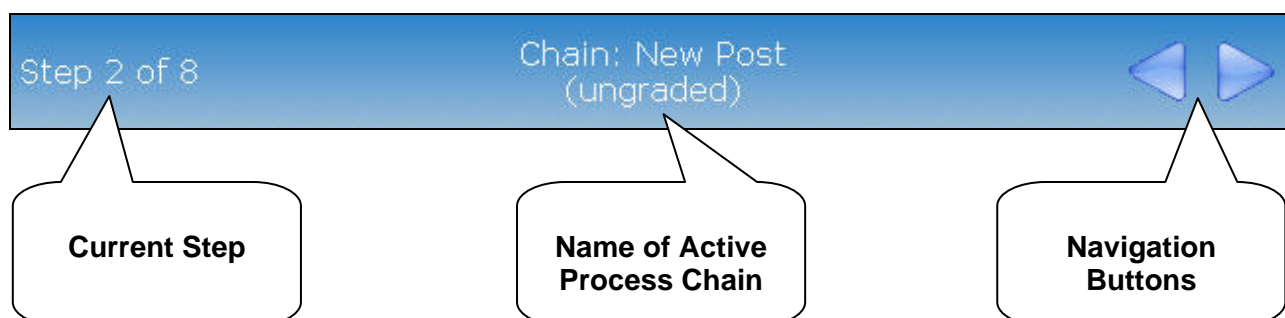
- Users do not have to remember the form sequence that is used for the required process, such as New Starters.
- Process chains can be stopped and restarted as required, therefore long processes can be completed in stages.

5.1 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.

5.2 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.

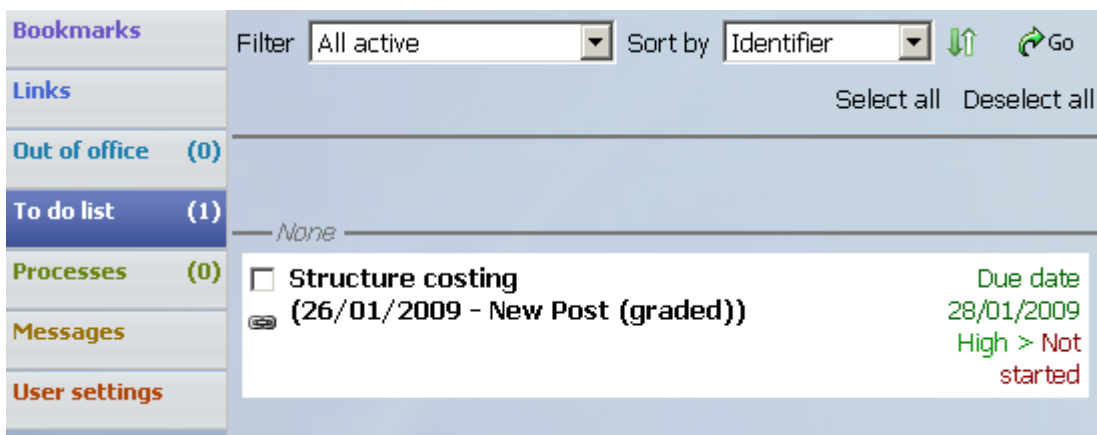


5.3 Stopping and Restarting the Process

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 option on the Home page



Filter	Sort by	Go
All active	Identifier	Go

Select all Deselect all

Out of office (0)

To do list (1)

None

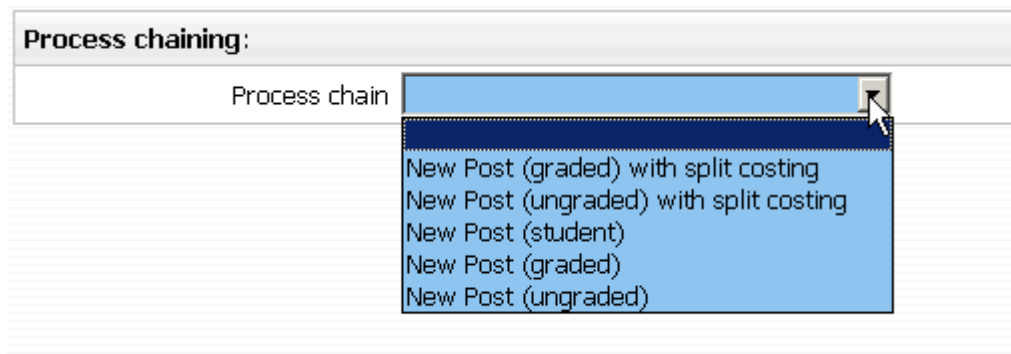
<input type="checkbox"/>	Structure costing	Due date
<input checked="" type="checkbox"/>	(26/01/2009 - New Post (graded))	28/01/2009
		High > Not started

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.

6 Post Details Process Chains

Once the new post has been created you will need to add further details. There are five Process Chains that are available for this.

- New Post (graded)
- New Post (ungraded)
- New Post (student)
- New Post (graded) with split costing
- New Post (ungraded) with split costing



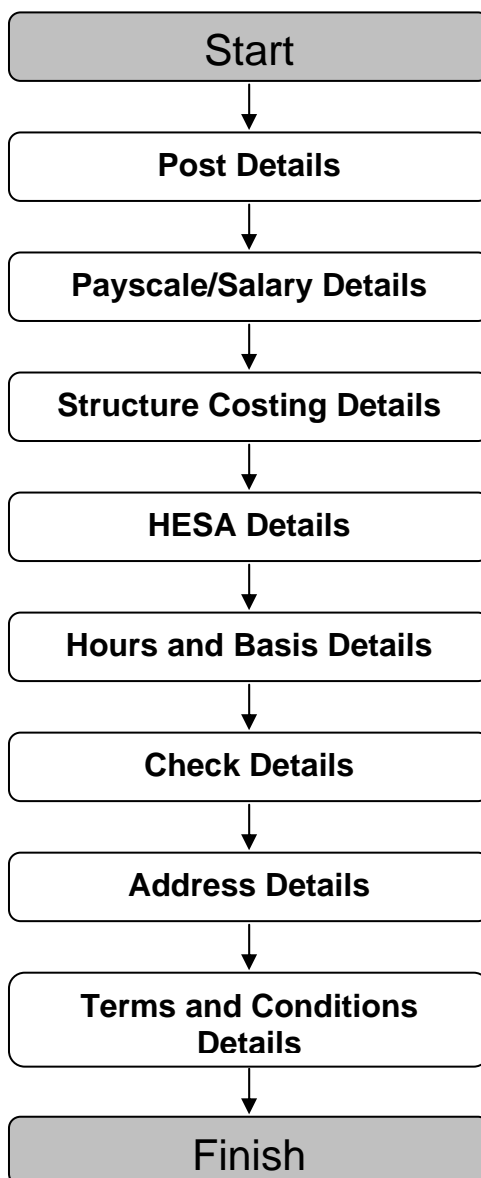
Process chaining:

Process chain
New Post (graded) with split costing
New Post (ungraded) with split costing
New Post (student)
New Post (graded)
New Post (ungraded)

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 Appointment Request Form – CHRIS/10 to establish which chain to use.

6.1 Process Chain overview

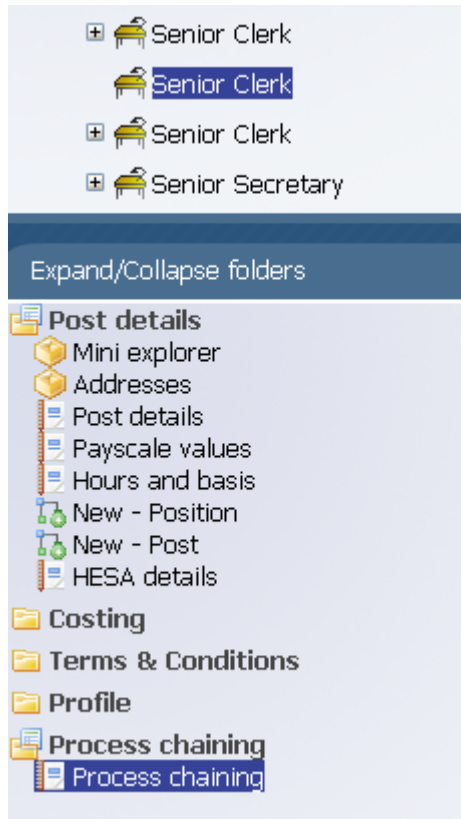
The New Post process chain encompasses many of the Trent forms that allow you to add key data to newly created Posts. The following diagram shows the forms encountered in the chain.



6.2 Starting the Process

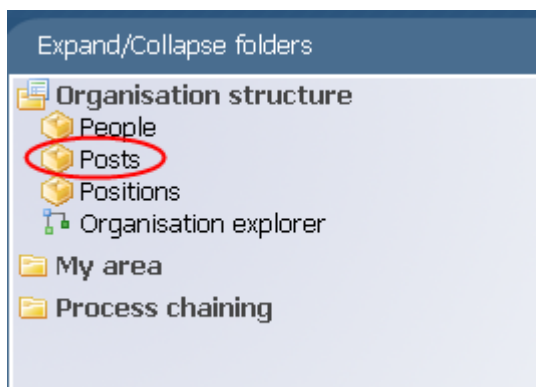
Navigate: Organisation > Posts > Search for New Post > Process Chaining > Process Chaining

If you have just created the new Post ensure this is selected and select the process chaining option.

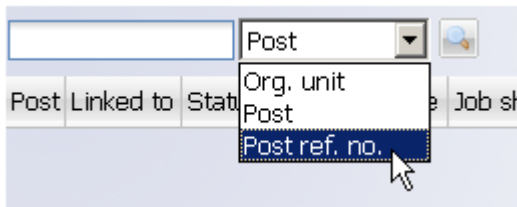


If not:

1. Select the University of Cambridge organisation
2. Select the Posts menu item from the Action Pane

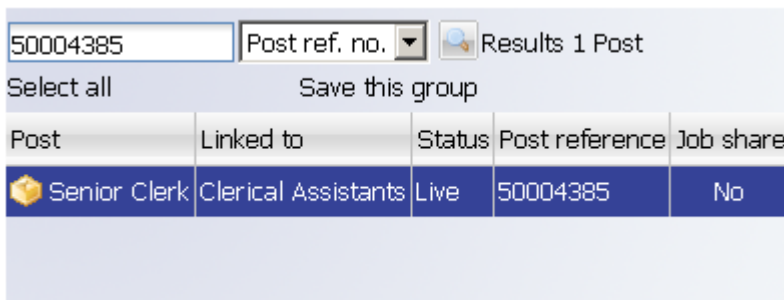


3. Search for the Post to be maintained using the post reference number.




A screenshot of a search interface. A text input field is empty. To its right is a dropdown menu currently set to 'Post'. A search icon is visible. A dropdown menu is open, showing three options: 'Org. unit', 'Post', and 'Post ref. no.'. The 'Post ref. no.' option is highlighted with a mouse cursor.

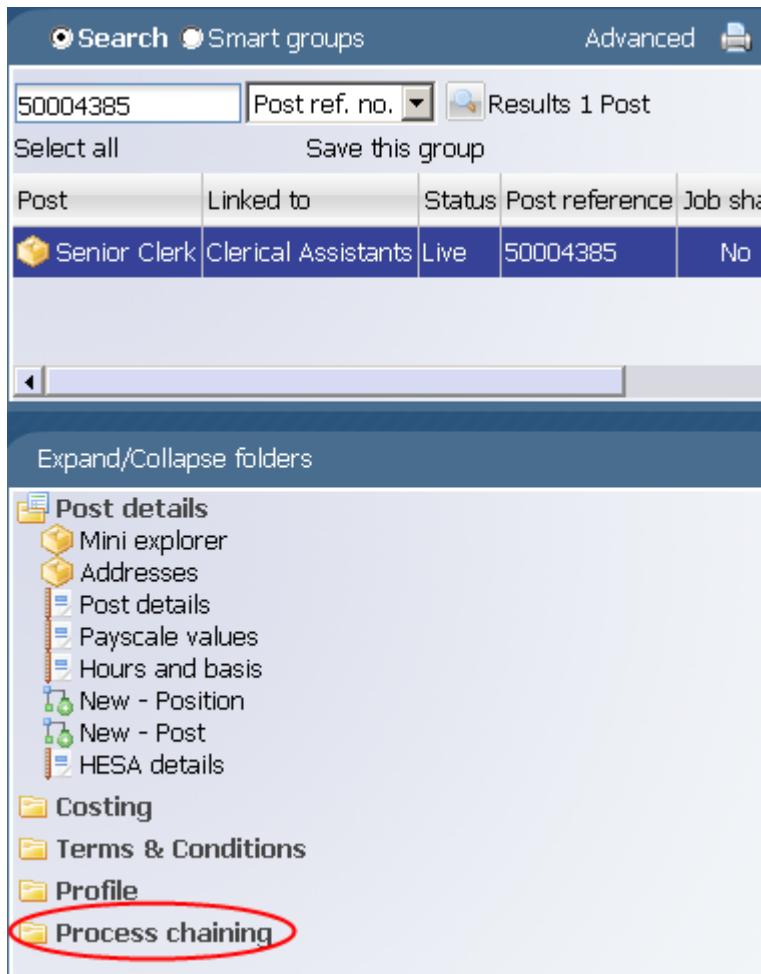
4. Select the post



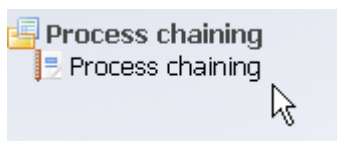
A screenshot of search results. The search input contains '50004385' and the dropdown is set to 'Post ref. no.'. The results show 'Results 1 Post'. There are buttons for 'Select all' and 'Save this group'. Below is a table with one row of results.

Post	Linked to	Status	Post reference	Job share
 Senior Clerk	Clerical Assistants	Live	50004385	No

5. Select the Process Chaining menu from the Action pane

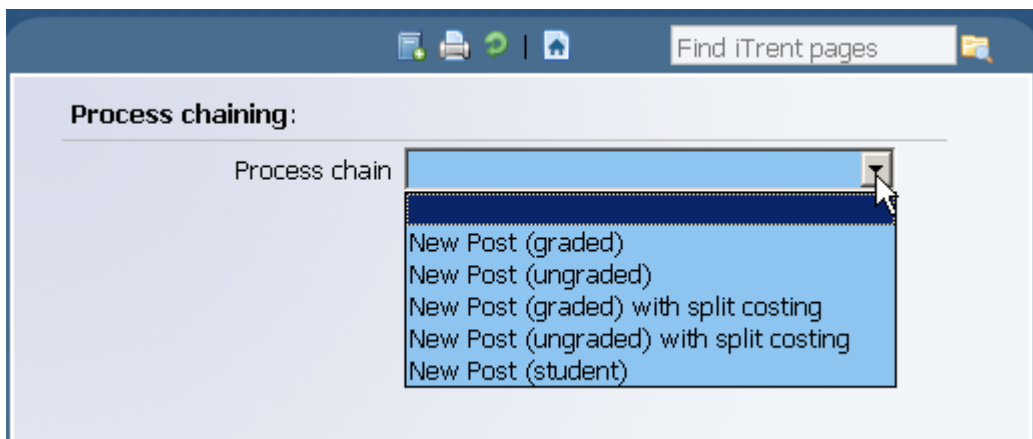


6. Select the Process Chaining option and type in the required date in the effective date field.

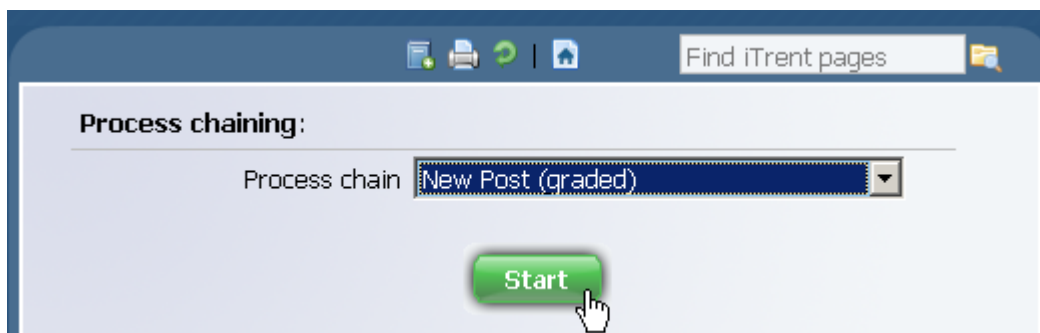


6.3 Creating a New Post - Graded

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



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



Step 1 of 8 Chain: New Post (graded)

Post details: Senior Clerk

Post

Start date 16/01/2009

End date change

End date

Post reference 50004385

Current status Live

Job share

Suspend from

Suspend to

Probationary period II

Location II


Structure workflow group II

Structure group 1 II

Structure group 2 II

2. 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

6.3.1 Payscale Values

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

Step 2 of 8 Chain: New Post (graded)

II Payscale values : Senior Clerk

Grade

Payment table

FT Salary

Protected

Override minimum

Override maximum

Grade payment table

Grade minimum

Grade maximum

Next increment date

Additional increment points

Protected rate of pay

FTE value 1.00

Change reason

Save Delete

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.

Step 2 of 8 Chain: New Post (graded)

II Payscale values : Senior Clerk

Grade

Payment table

FT Salary

Protected

Override minimum

Override maximum

Grade payment table National Spine

Grade minimum 029 -- 20,226.00

Grade maximum 033 -- 22,765.00

Next increment date

Additional increment points

Protected rate of pay

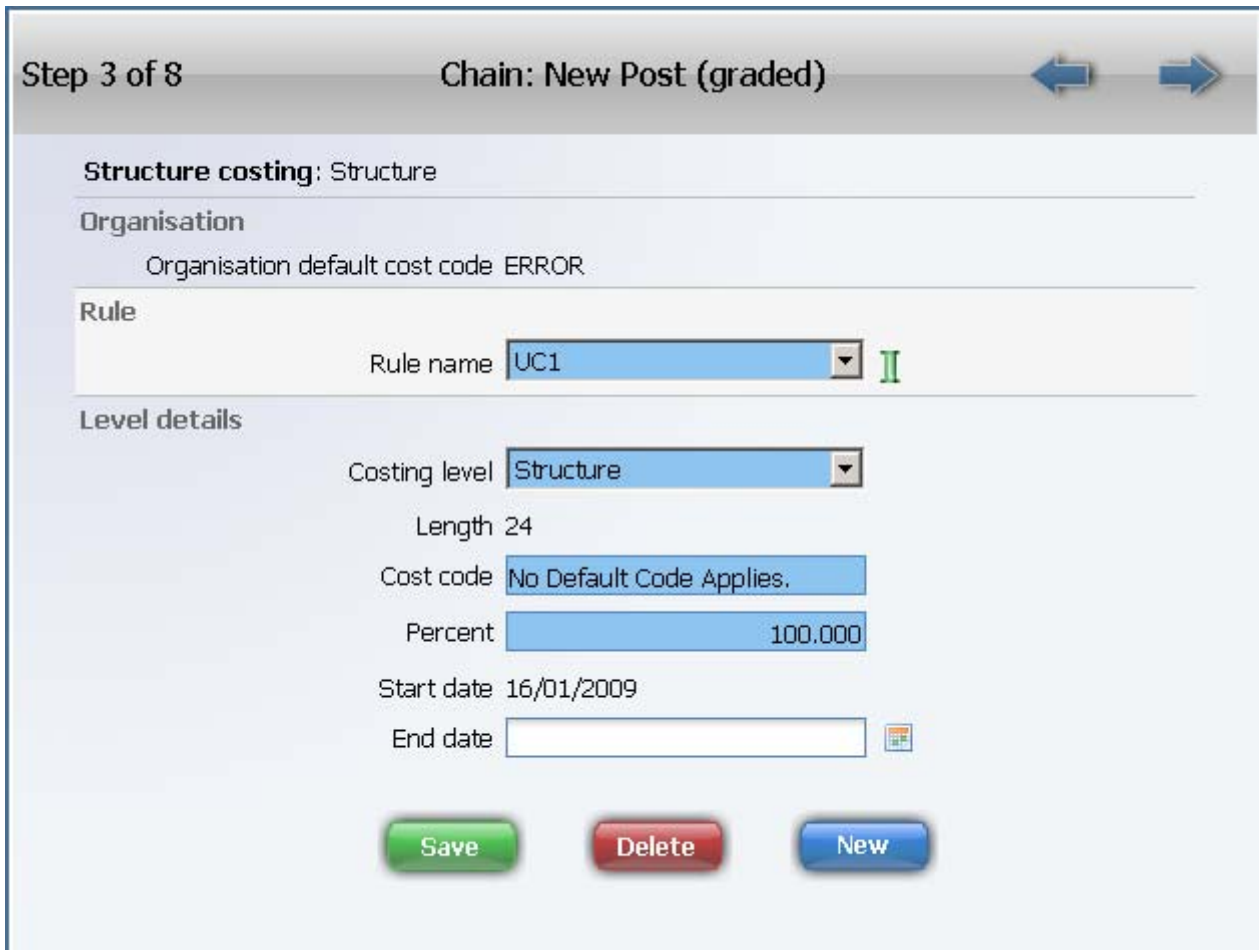
FTE value 1.00

Change reason

4. Click the  button

6.3.2 Structure Costing

1. Click on the Next Step button, this will present you with the form to enter the Structure Costing information.



Step 3 of 8 Chain: New Post (graded)

Structure costing: Structure

Organisation
Organisation default cost code ERROR


Rule
Rule name UC1

Level details
Costing level Structure
Length 24
Cost code No Default Code Applies.
Percent 100.000
Start date 16/01/2009
End date

Save Delete New

2. No structure costing information will be available at this stage. Click the forward button to go to step 4.

6.3.3 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.

Step 4 of 8 Chain: New Post (graded)

HESA details: Senior Clerk

Campus identifier: Entire Institution II

Senior management post: II

Atypical: II

Exclude from HESA return: II

Principal source of basic salary: [dropdown] II

Secondary source of basic salary: [dropdown] II

Percentage of salary charged against general income: [input] II

NHS contracts: [dropdown] II

NHS contract grade: [dropdown] II

Healthcare professional speciality: [dropdown] II

Academic employment function: Not teaching and/or research II

HEI joint contracts: [dropdown] II


Code: [input] Cost centre: Central Administration and Services

Activity 1: [dropdown] II

Activity 2: [dropdown] II

Activity 3: [dropdown] II

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. NHS contracts and grade is applicable only for Clinical appointments.
7. Healthcare professional speciality is applicable only for Clinical appointments.
8. Academic employment function will be set by inheritance and should not need to be maintained.
9. HEI is always left blank as the University does not issue joint contracts with other HEI's.

10. 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 CHRIS/1 OR CHRIS/2 HESA Classification.
11. Activity codes 2 and 3 are not used.
12. Cost Centre can be left at the inherited value. Any overrides will be provided by the HESA correspondent.
13. Percentage can be left at the inherited value of 100%
14. Click the  button

6.3.4 Hours and Basis Details

1. Click on the Next Step button

Step 5 of 8
Chain: New Post (graded) ← →

Post hours and basis : Senior Clerk

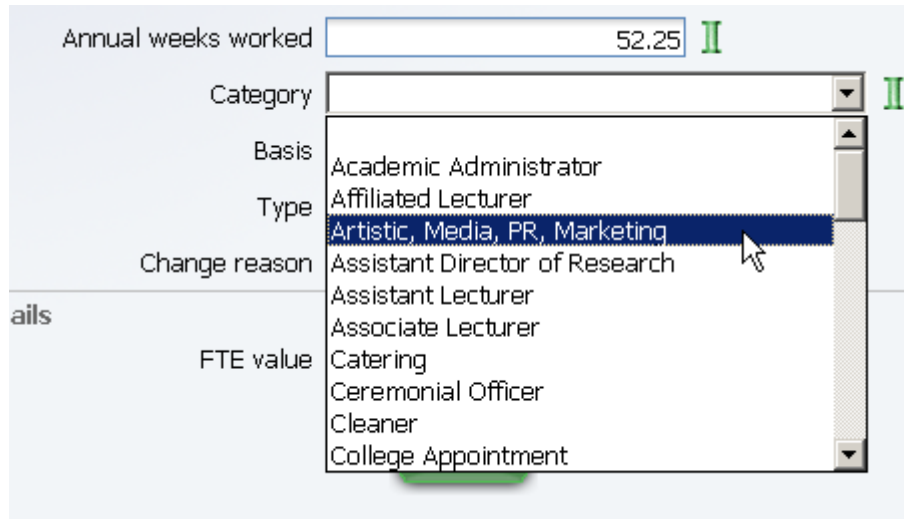
Post hours	<input type="text" value="36.50"/>	II
FTE hours	<input type="text" value="36.50"/>	II
Budgeted hours	<input type="text" value="36.50"/>	II
Allocated FTE	0.00	
FTE variance	-1.00	
Allocated hours	0.00	
Unallocated hours	36.50	
Headcount	0	
Annual weeks worked	<input type="text" value="52.25"/>	II
Category	<input type="text"/>	II
Basis	<input type="text" value="Assistant"/>	II
Type	<input type="text" value="Assistant CS"/>	II
Change reason	<input type="text"/>	

FTE details

FTE value 1.00

2. Check the inherited details on this form.

Add details for category, basis and type according to the details provided on the New Post Request Form



The screenshot shows a web form with the following fields and options:

- Annual weeks worked: 52.25 II
- Category: [Dropdown menu]
- Basis: [Dropdown menu]
- Type: [Dropdown menu with 'Artistic, Media, PR, Marketing' selected]
- Change reason: [Dropdown menu]
- FTE value: [Dropdown menu]

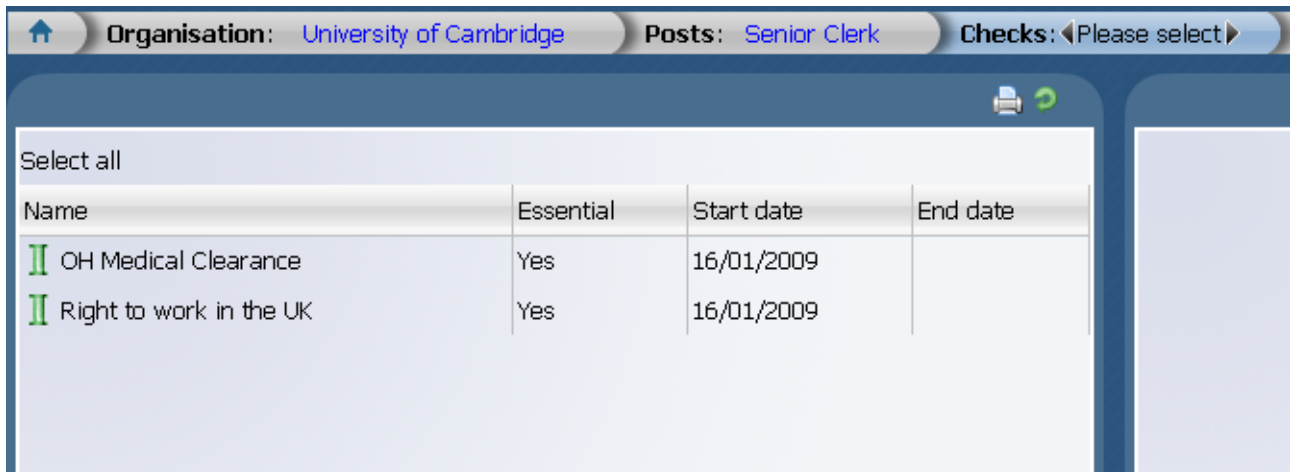
The dropdown menu for 'Type' contains the following options:

- Academic Administrator
- Affiliated Lecturer
- Artistic, Media, PR, Marketing
- Assistant Director of Research
- Assistant Lecturer
- Associate Lecturer
- Catering
- Ceremonial Officer
- Cleaner
- College Appointment

3. Click the  button

6.3.5 Check Details

1. Click on the Next Step button



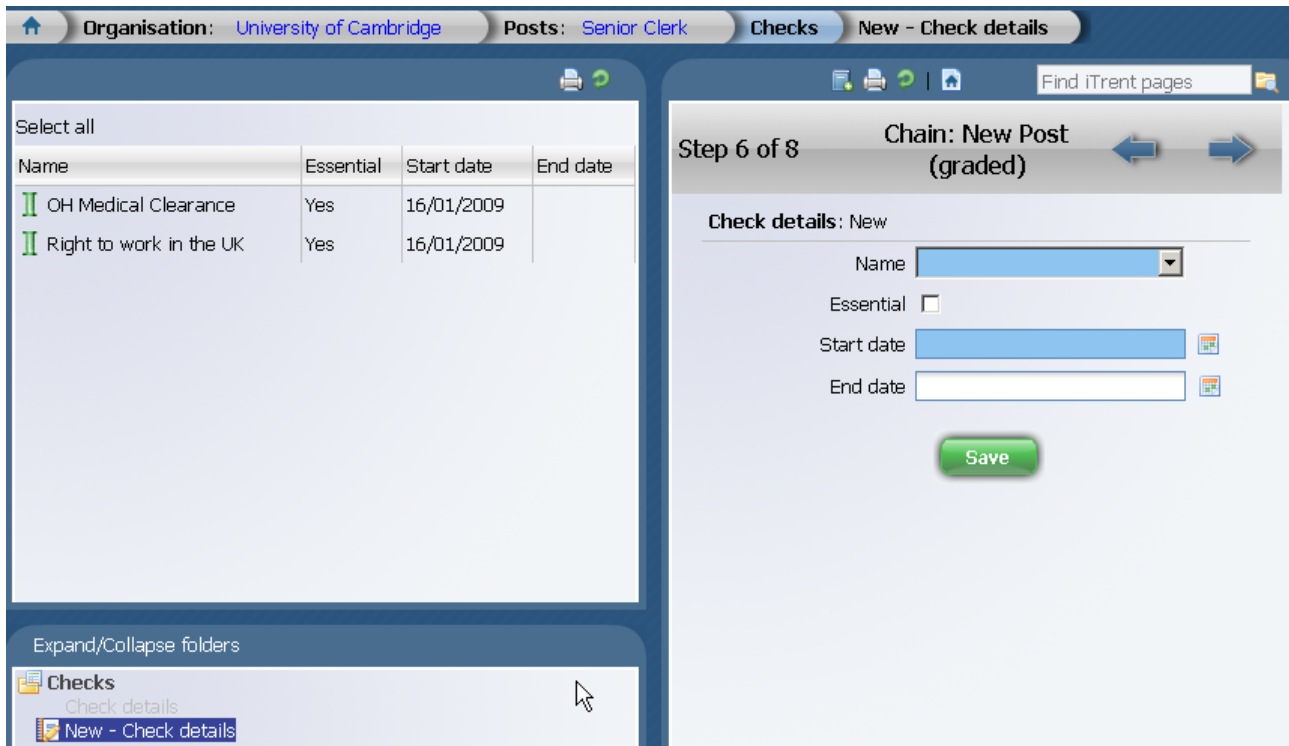
2. Checks will be displayed in the object pane. Select one of the listed checks to view step 6 of the screen chain.



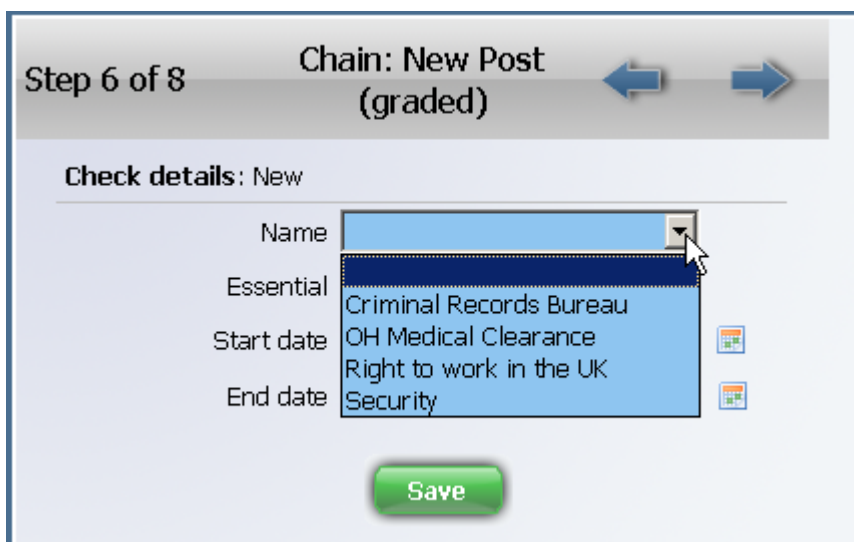
3. The Right to Work check details will be displayed. This check is a requirement for every Post. It is an inheritable item set at the top of the organisation and does not require setting as part of the screen chain.

If no additional checks are required, use the next step arrow to advance to step 7.

4. If a Criminal Records, OH Medical or Security check is required for the Post, select New – Check details.



5. Click the drop down arrow to the right of the name field and select the required check.



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



Step 6 of 8 Chain: New Post (graded)


Check details: New

Name

Essential

Start date

End date

7. Click the  button
8. Where additional checks are required, select New Check details again and follow steps 4 to 5.

6.3.6 Address Details

1. Click on the Next Step button
2. The current UMS address for the Post will be displayed



Address type	Address	Start date	End date
UMS	Academic Division The Old Schools Trinity Lane CAMBRIDGE CB2 1TT	16/01/2009	

Step 7 of 8 Chain: New Post (graded)

Address: UMS

Address type: UMS

House Name: Academic Division

Number/Street: The Old Schools

Local Area: Trinity Lane

POSTTOWN: CAMBRIDGE

COUNTRY:

POSTCODE: CB2 1TT

Country: United Kingdom

Start date: 16/01/2009

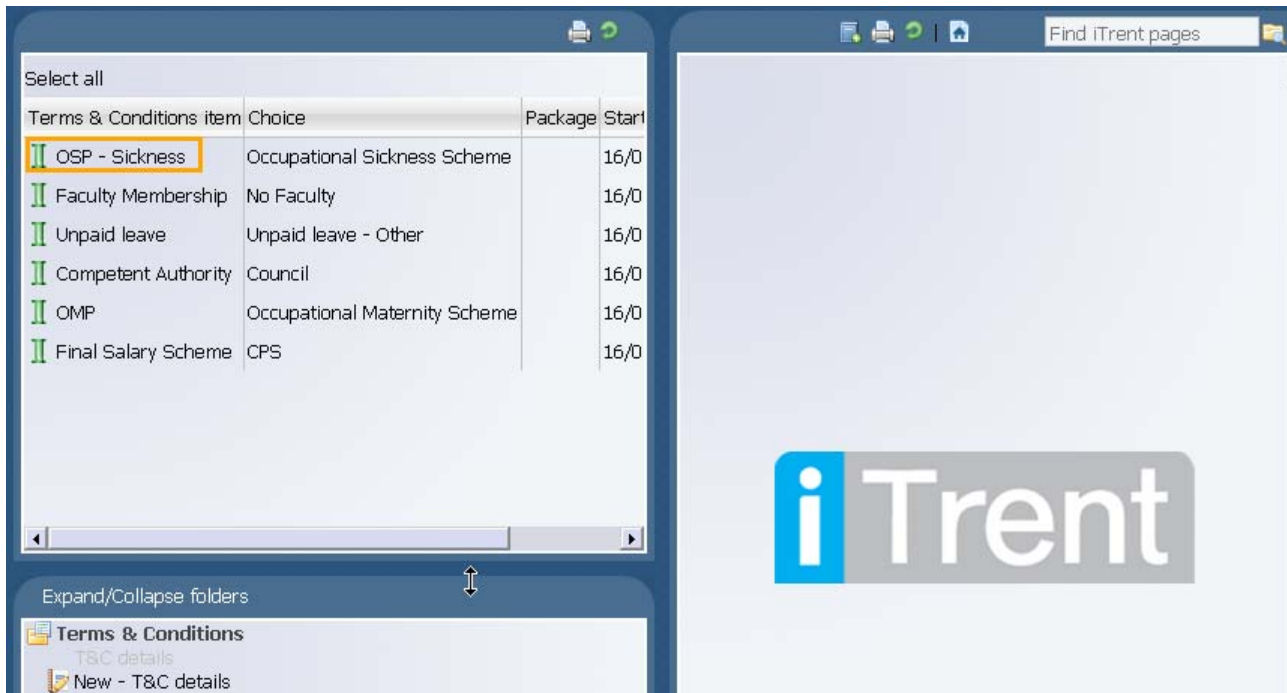
End date:

Buttons: Save, Delete, New

There should be no need to amend this data.

6.3.7 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).
Click on one of the T & Cs listed to view the last step of the screen chain.

Step 8 of 8 Chain: New Post (graded) 

II Terms & conditions : OSP - Sickness (Occupational Sickness Scheme)

T&C Item

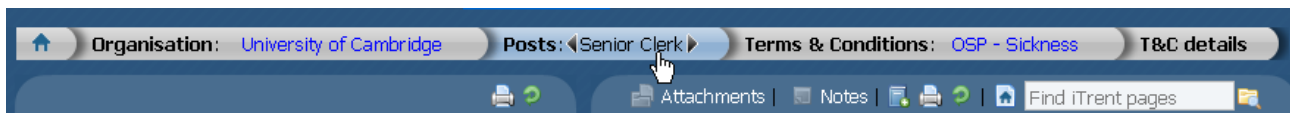
Choice

Notes

Start date 16/01/2009

End date

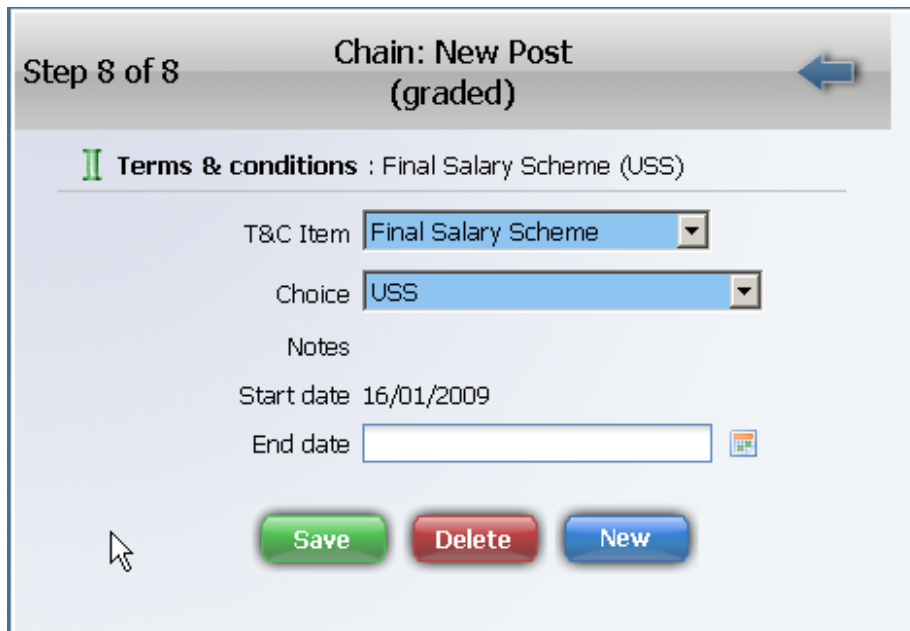
3. Click on the new Post in the navigation trail to leave the screen chain and view the mini explorer



Changing a post to non-pensionable

A change to the inherited Terms and Conditions may be required where a post is non-pensionable. For example, for a Marie Curie Fellow, or where the post hours are zero the post is non-pensionable. The Final Salary Scheme should be changed to non-pensionable.

1. Select the term and condition to be changed – Final Salary Scheme



Step 8 of 8 Chain: New Post (graded)

II Terms & conditions : Final Salary Scheme (USS)

T&C Item Final Salary Scheme

Choice USS

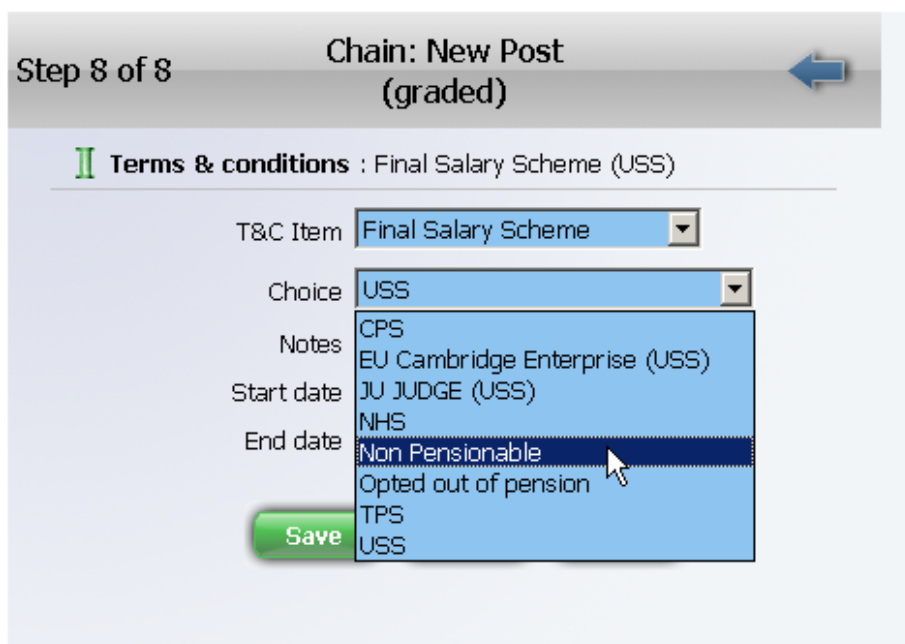
Notes

Start date 16/01/2009

End date

Save Delete New

2. Click the drop down arrow to the right of choice and select Non Pensionable.



Step 8 of 8 Chain: New Post (graded)

II Terms & conditions : Final Salary Scheme (USS)

T&C Item Final Salary Scheme

Choice USS

Notes

Start date

End date

Save

CPS

EU Cambridge Enterprise (USS)

JU JUDGE (USS)


NHS

Non Pensionable

Opted out of pension

TPS

USS

3. Click the  button

7 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.

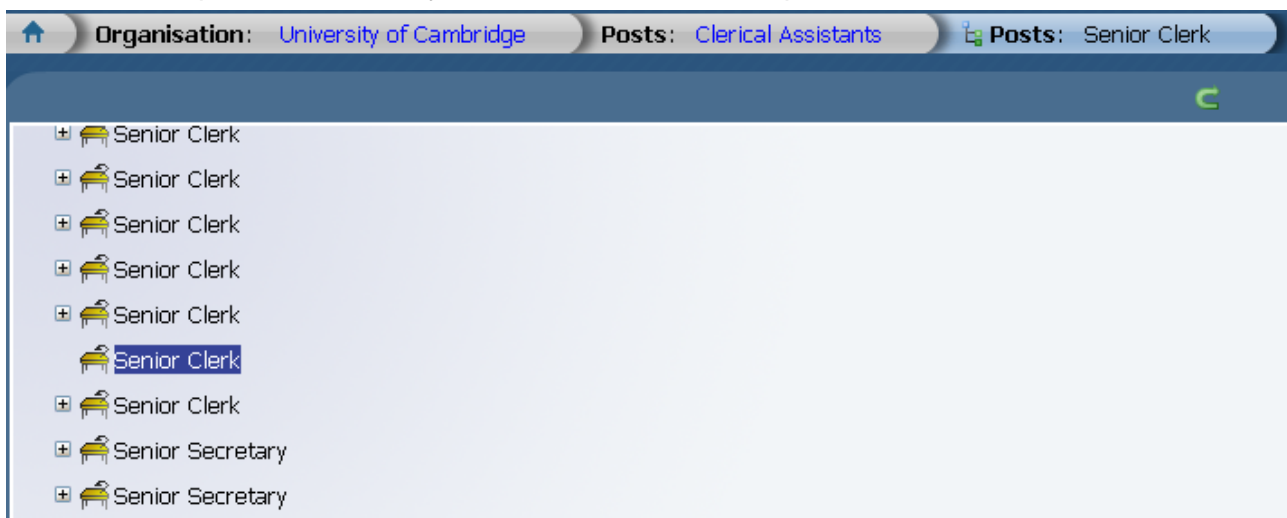
A blue position icon  indicates it is occupied by a person

A green position icon  indicates a vacant position

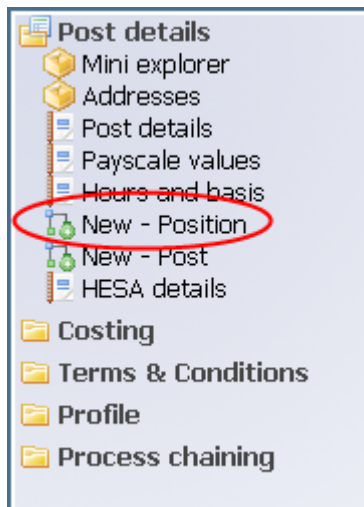
A position always belongs to a Post.

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 New - Position option in the Action Pane



Trent opens the New - Position page in the display pane


A screenshot of the 'New - Position' form. The title 'New - Position:' is at the top. Below it are two input fields: 'Name' and 'Quantity'. The 'Quantity' field contains the number '1'. A green 'Save' button is centered below the fields.


3. Enter a name for the new position.
The Post name is the 'official' title and the position name is the 'in-house' title.

A screenshot of the 'New - Position' form. The title 'New - Position:' is at the top. Below it are two input fields: 'Name' and 'Quantity'. The 'Name' field contains the text 'Database Administrator'. The 'Quantity' field contains the number '1'. A green 'Save' button is centered below the fields.

4. The quantity will automatically be set to 1.

5. Click the  button on the new - position page to save your changes.

 Changes have been saved.

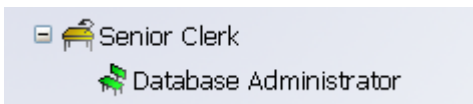
 Please enter more details and press save to add another.

New - Position:

Name

Quantity

Trent adds the new Position to the Organisation structure and the explorer diagram is updated accordingly, showing a vacant (green) chair for the position.



7.1 Position reference number

A position reference number is automatically generated by Trent when a position is created. To enable the contract team to easily identify this position when attaching a person record the new position number in the box at the bottom of the CHRIS form

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

Position details: Database Administrator

Job title Database Administrator

Start date 16/01/2009

End date change

End date

Position reference 70005775


Probationary period II

Location II


Structure workflow group II

Occupant Vacant

Reporting unit Academic Division

Reports to Senior Secretary 

Miss Rachel Bunting (16/01/2009 -)

Expected position end date 


Expected position end reason

Structure group 1 Unified Administrative Service II

Structure group 2 Contract team D II

Position status

Position status Permission to Fill granted

Effective from 16/01/2009 

7.2 Position Status

When a new position is created the position status will automatically be set to 'permission to fill granted'.

Positions created by Grading and Reward **must** be changed from permission to fill granted to pending authority.

The permission status is displayed at the bottom of the position details screen

Position details: Database Administrator

Job title Database Administrator

Start date 16/01/2009

End date change

End date

Position reference 70005775

Probationary period II

Location II

Structure workflow group II

Occupant Vacant

Reporting unit Academic Division

Reports to Senior Secretary

Miss Rachel Bunting (16/01/2009 -)

Expected position end date

Expected position end reason

Structure group 1 Unified Administrative Service II

Structure group 2 Contract team D II

Position status

Position status Permission to Fill granted II

Effective from 16/01/2009

1. Select the newly created position and choose the position details menu.
2. Enter the effective date
3. Click the drop down arrow to the right of position status.

Position status

Position status

Effective from

- Pending Authority
- No permission status
- Held in abeyance
- Temporarily held vacant to create savings
- Permission to Fill granted

4. Select 'Pending Authority'

Position status

Position status (pending authorisation)

Effective from

Change reason

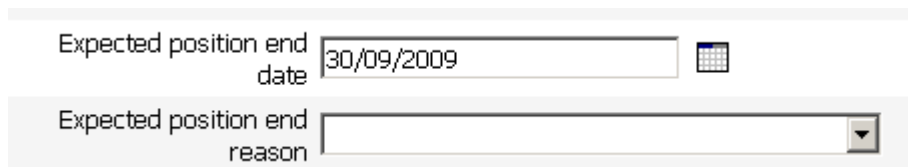
5. Click on the  button.

7.3 Creating a Position on a temporary basis

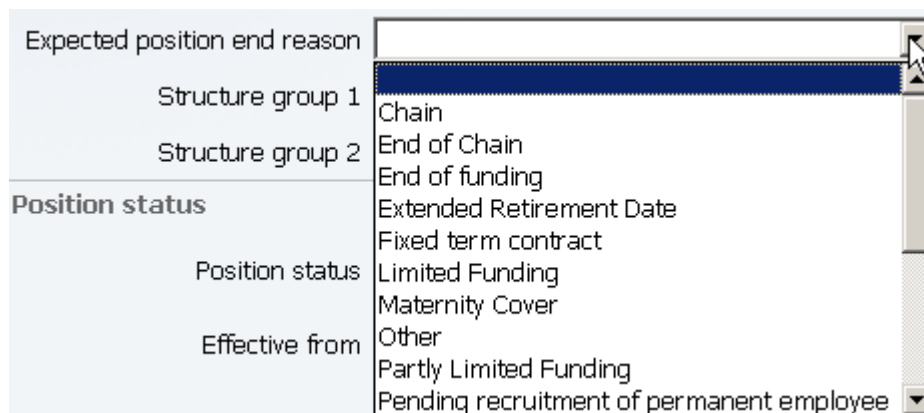
To create a temporary position it is necessary to make use of Expected position end date and Expected position end reason fields within position details.

1. Select the position created
2. Select position details from the action pane
3. Enter the date when the position is expected to end.

The date is for information purposes and will not end the position at that date.



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



5. Click the  button

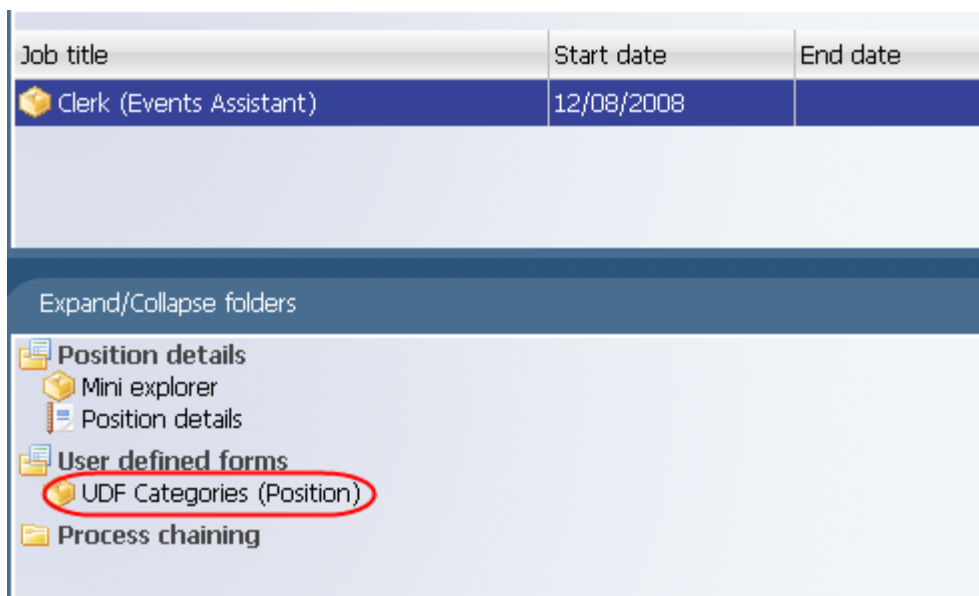
7.4 User Defined Fields

Some of the data required for Cambridge University is held on fields in forms that are not standard with the Trent application, these are referred to as User Defined Fields (UDFs).







7.4.1 Role Code Number

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).

UDF category	No. of rows
 Invigilator Rate	0
 NHS Trust Information	0
 Permission to create	0
 Role Code Number	1
 Term-time only details	0
 University Office	0





Expand/Collapse folders

-  **UDF Categories**
-  **UDF Details (Position)**
-  **Process chaining**

4. The Role Code reference will be displayed

Reference
 AH0045

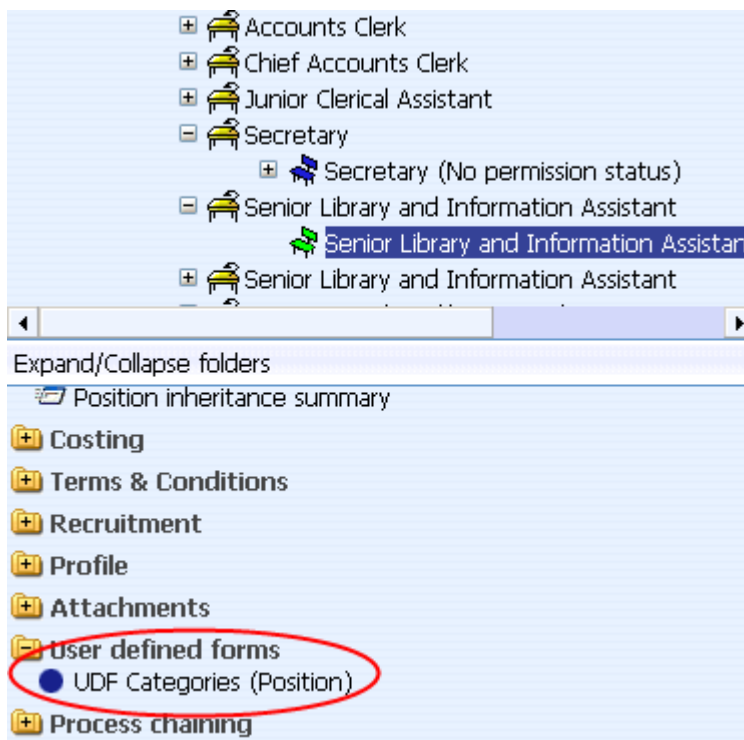
Expand/Collapse folders

-  **UDF Details**
-  UDF Details (Position)
-  New - UDF Details (Position)
-  **Process chaining**

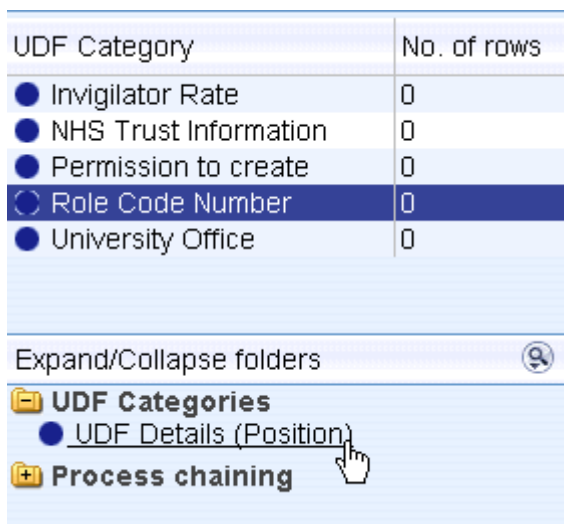
7.4.2 Adding Role Code Number

The Grading and New Post Request Form CHRIS/1 will be used to record the Role Code Number where applicable in Section A, question number 6. This number should then be recorded in Trent in the UDF Details for the position.

1. Select the newly created position
2. Select User defined forms and then UDF Categories (Position)



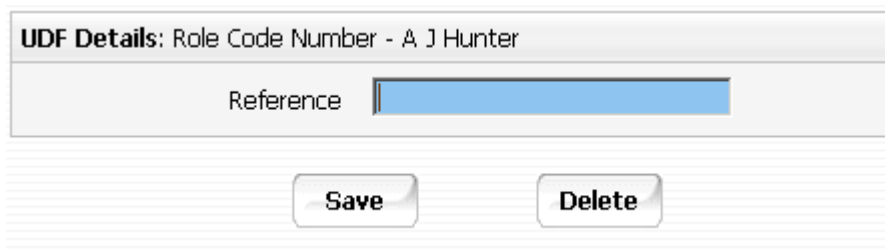
3. Select Role Code Number from the list of User Defined Fields and click on UDF Categories (Position)



- Select New – UDF Details (Position)



- Key in the Role Code Number



The screenshot shows a form titled 'UDF Details: Role Code Number - A J Hunter'. It has a 'Reference' field with a blue cursor. Below the field are two buttons: 'Save' and 'Delete'.

- Click the  button

The No. of rows column will be displayed with a '1' against Role Code Number to indicate that an entry has been made.

UDF Category	No. of rows
<input checked="" type="radio"/> Invigilator Rate	0
<input checked="" type="radio"/> NHS Trust Information	0
<input checked="" type="radio"/> Permission to create	0
<input checked="" type="radio"/> Role Code Number	1
<input checked="" type="radio"/> University Office	0