

# iTrent Guidance



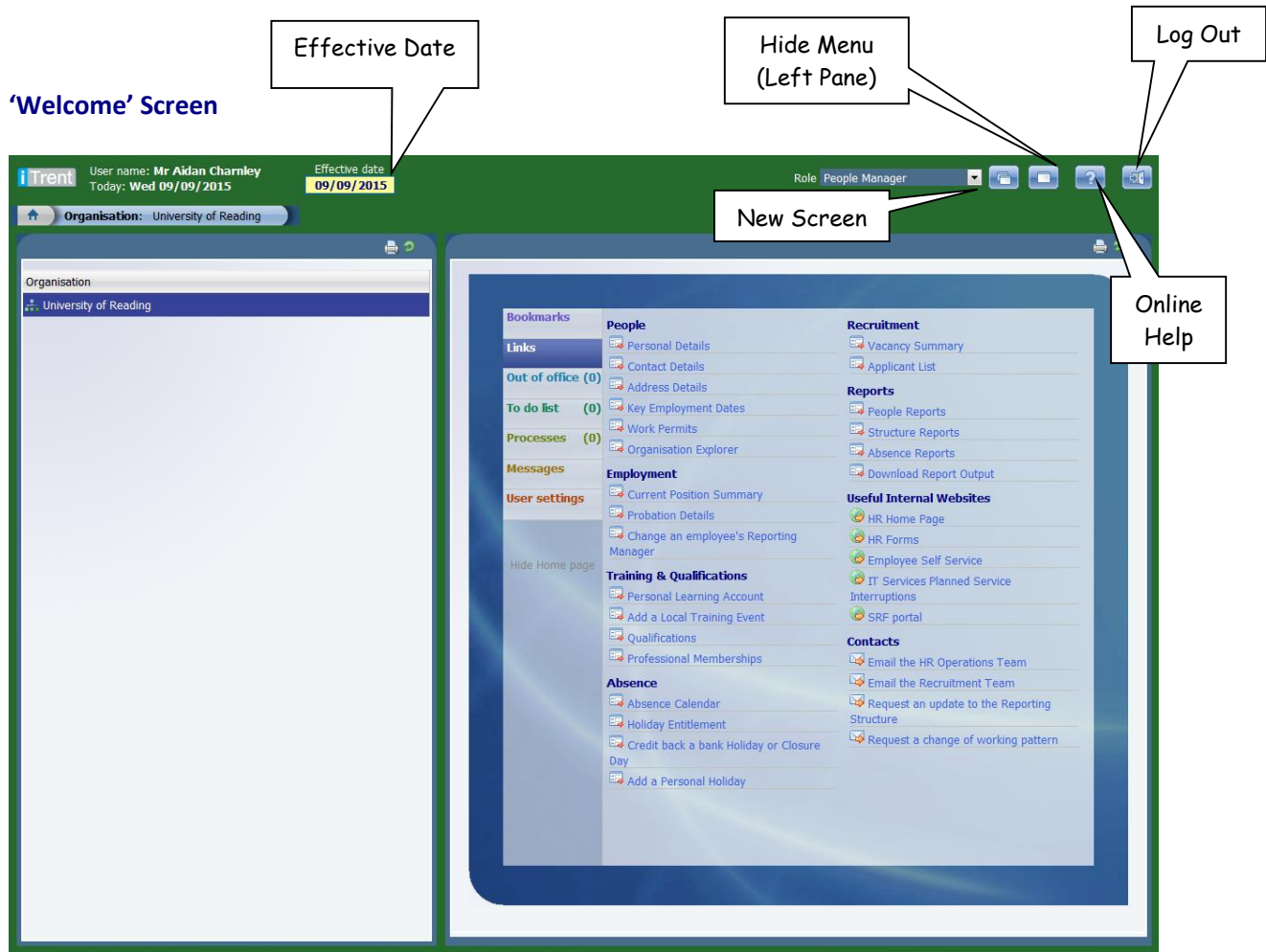
iTrent or 'Trent' is the HR and Payroll system at the University of Reading. It allows authorised users to view and/or edit information stored in Trent about University staff.

Access is controlled by role groups: **People Manager** and **School Admin**. People Manager is based on reporting lines and so users can only see staff within their reporting line. School Admin is a level of access aimed at School/Departmental Administrators. This role group is based on the Organisation Structure in Trent, enabling the user to see information about all staff within a specific unit irrespective of the line-reporting relationship. This profile has been designed to facilitate the devolution of records access and routine maintenance to key staff within each School, Department or functional area of the University. Access can also be provided to information about staff in a specific department or team if it exists as a separate unit on Trent.

Please note that users are currently only able to access Trent using PCs that are part of the University's network; attempts to access Trent from outside the University will be denied.

This document provides guidance on using Trent with a School Admin profile. Should you encounter any problems or have any queries please contact [hr@reading.ac.uk](mailto:hr@reading.ac.uk).

<b>Contents</b>	<b>Page</b>
<a href="#">Welcome Screen</a>	3
<a href="#">Views and Searches</a>	4
<a href="#">Organisation Explorer</a>	5
<a href="#">Employee Information</a>	6
<a href="#">Reporting Manager</a>	8
<a href="#">Training and Qualifications</a>	8
<a href="#">Absence</a>	11
<a href="#">Recruitment</a>	15
<a href="#">Reports</a>	19
<a href="#">Contacts</a>	22



When you log into School Admin (People Manager) you will see a screen similar to that above. There are 7 tabs:

### Links

The main navigation menu for users where you can access all available screens, direct links to forms in Trent, and to useful websites and contacts.

### Bookmarks

Any 'bespoke' links added by the user can be found here.

### Out of Office

By default this will display absences for immediate reporting lines only but it is possible to amend this in the 'My Settings' area. Included are training courses, annual leave, sickness, maternity and paternity absences.

### To Do List

Any outstanding workflow tasks, such as authorisations, can be accessed here. For Reporting Managers, we have enabled Tasks to be available in ESS as well so that they don't have to login to Trent to authorise annual leave and other tasks.

### Processes

Shows the status of any background processes initiated by the user, such as reports and the bulk application print which may have been run in the last 24 hours.


## Messages

This area displays any systems messages (such as notification of downtime) input by the HR Systems Team.

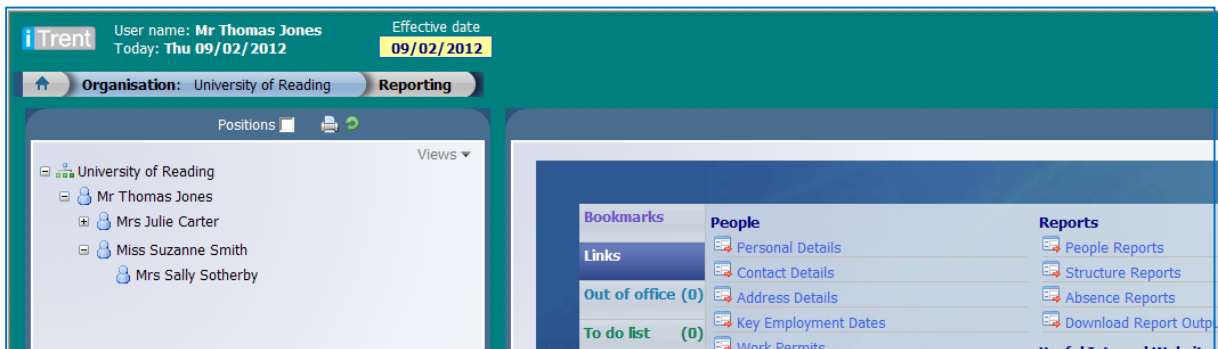
## User Settings

You may change the default Out of Office levels, font size and other options here. (E.g. font size, how long tasks are displayed for, colour settings etc)

## Views and Searches

**People Manager** users can view reportees by clicking on the  icon in the top-left corner of the screen. Use the +/- buttons to drill-down the view of the structure.

Both of the views available here will show only the area of the structure with reporting lines to the user logged-in. In order to see a read-only view of the whole University choose 'Organisation Explorer' from the main Links page (see section below).

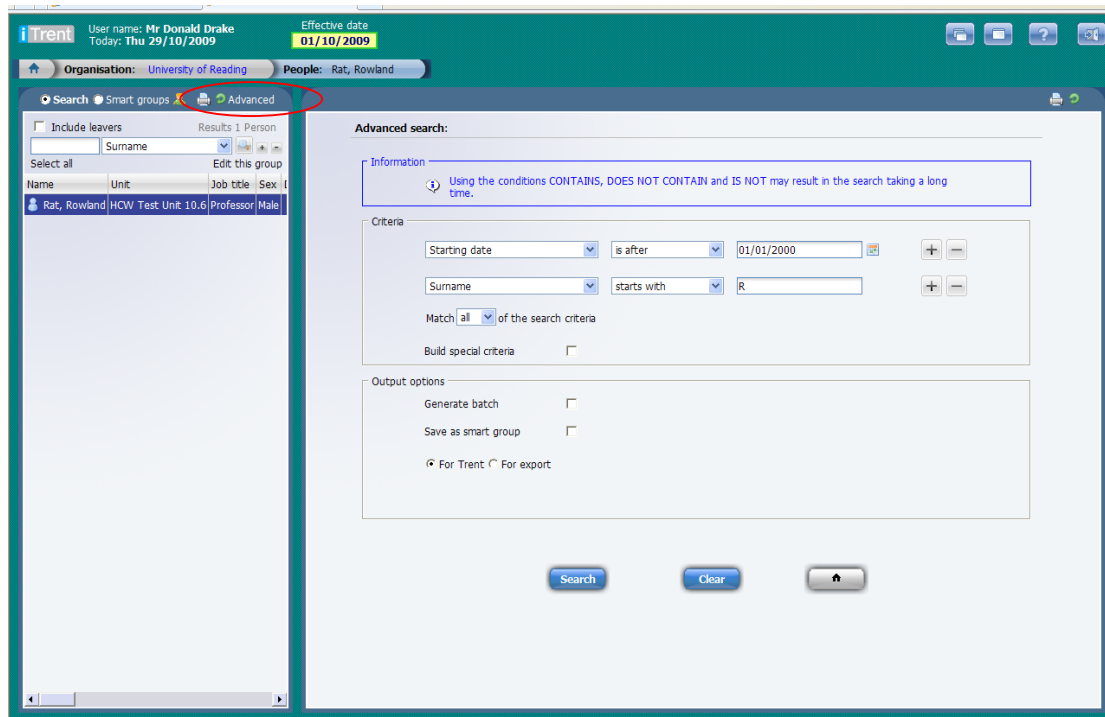


You will be presented with a view of your direct reports. If you click on the 'Views' icon you can change to the People Search area where you can search for an individual or groups of employees by Surname. You can also access the Advanced Search from this view.

## Advanced Search – People Manager

You can generate a list of employees from basic criteria by making use of the Advanced Search facility.

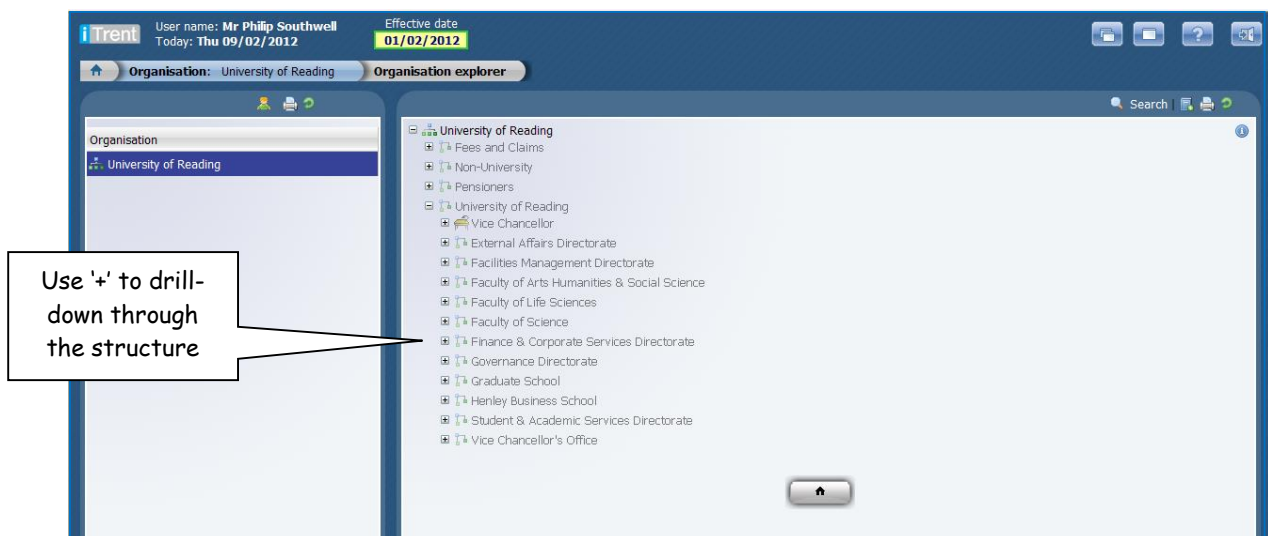
Choose 'People Search' as your selected view and then click on 'Advanced'. The right-hand pane will now show selection criteria in the form of drop-down lists. Once your search has completed, the results will show in the left-hand pane, from which you can then navigate to other areas of the system, save as a Smart Group (see below) or download into excel.



To download into excel, right-click on the search results and select Export to Microsoft Excel. This is a useful means of getting a quick list of employees, such as all members of a particular Reporting Unit.

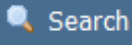
A Smart group is simply a saved search, with results that you can return to time and time again. When you run the Advanced Search, select the 'Save as a Smart Group' checkbox. You will be prompted to choose a name for the group and also decide whether you want it to be fixed or dynamic. A dynamic Smart group updates itself as employee data is added or amended. For example, it can be a useful way of grouping together all staff of a particular grade in your area of the organisation.

## Organisation Explorer












The Organisation Explorer is a diagram of the University organisation hierarchy. The structure is maintained by Human Resources and the HR Systems Team. The Monthly Departmental

Staff list should be checked and used to inform us of any changes. Alternatively, contact us using the email link on the Links page.

Use the  icon to conduct a quick search for any member of the University and see where they are based.

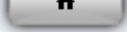
All areas of the structure will be 'greyed-out' and therefore inaccessible except for the Departments, people and positions that the person logged-in has been given access to.

#### Key:

	Search
	Drill-down
	Organisation
	Reporting Unit
	Post
	Occupied Position
	Empty Position
	Vacancy awaiting Recruitment/Transfer/Start of Employment
	Refresh Data

#### Employee Information

Navigate through the Links in the various folders on the Welcome screen sections to view a selection of data relating to the employee you have chosen. You will be able to access data relating to the employee (such as contacts, start dates) and their job (hours, salary) by using the links in the People and Employment folders.

To return to the main Welcome screen at any time, either click on the  icon at the bottom of the page or click on 'People' in the navigation trail at the top of the page.

#### Position Summary

The position summary screen gives an overview of various details relating to the reportee's position effective at that date. As well as giving general information on the position you can click the + icons to view further information on:

- Reporting Manager - Who their reporting manager is
- History - The history of their contractual status
- Category, Basis & Type - The category, basis and type of their employment
- Hours - The number of hours they are budgeted to work in a week
- Costing Levels - The cost code that the position is accountable to
- Payment Details - Basic details of the position's salary
- Working Pattern

A working pattern is a representation of a member of staffs' working week, the days of the week an individual works, and the hours they work on each of those days. Working patterns can also accommodate rotational patterns, shift and compressed hours etc. The accuracy of a working pattern is essential for all staff members as it is used within absence calculations (such as sickness and annual leave).

### Categories

**Reporting manager**

Reporting manager Mr Richard Speight  
Reporting manager position HR Systems Manager  
Reporting manager unit HR Systems

---

**History**

---

**Patterns**

Start date	End date	Type	Value
27/01/2015		Qualifying Pattern	Absence
27/01/2015		Working Pattern	35:00 total (M7 Tu7 W7 Th7 F7 Sa0 Su0)

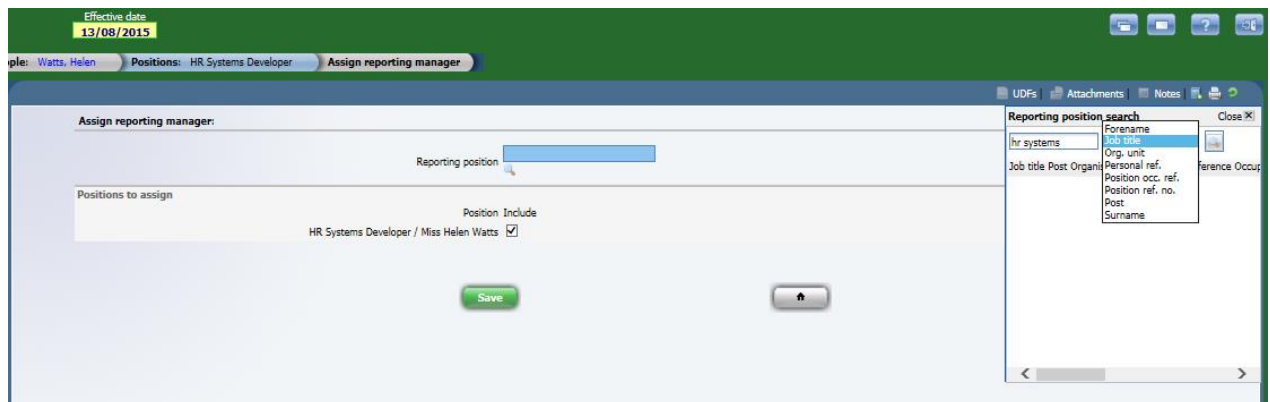
Abbreviation	Staff Category	Grades	Contracted Hours per week	Annual leave entitlement	Pension Scheme	Increment date
<b>AAS</b>	Academic Administrative Support	Grades 1 - 5	36	35 Days (21 Personal Holiday, 8 BH, 6 Closure Days)  (4 extra personal days after 5 years service)	URPS	<b>1 August</b>  (first year subject to starting point)
<b>AOS</b>	Manual					
<b>KTP</b>	Knowledge Transfer Partnership					
<b>P&amp;M</b>	Professional & Management Clinical Tutor	Grade 6 and above Lecturers Research Fellows Associate Professors Professors Sessionals Administration Managers	35	40 days  (26 Personal Holiday, 8 BH, 6 Closure Days)	USS	<b>1 October</b>  (first year subject to starting point)  (no increment date for Grade 9 and Senior Pay)
<b>A&amp;R</b>	Academic & Research					

## Change of Reporting Manager

School Admin users have the ability to change the Reporting Manager for staff in their part of the Trent Organisation Structure in order to maintain the information more easily. You will not be able to assign a Reporting Manager from outside your School/Department/Unit that your access covers.

The effective date for this change is critical. If it's an immediate change then use today's date. If a future change, the effective date at the top of the screen needs to reflect the future date when the change should happen.

If you have a Reporting Manager away from the office for an extended period of time (for example long term sickness), you can change the reporting manager for their reportees and put the formal Reporting Manager back as a future dated change for when they are due back into the office.



Effective date  
13/08/2015

Watts, Helen | Positions: HR Systems Developer | Assign reporting manager

Reporting position

Positions to assign

Position	Position Include
HR Systems Developer / Miss Helen Watts	<input checked="" type="checkbox"/>

Save

Reporting position search

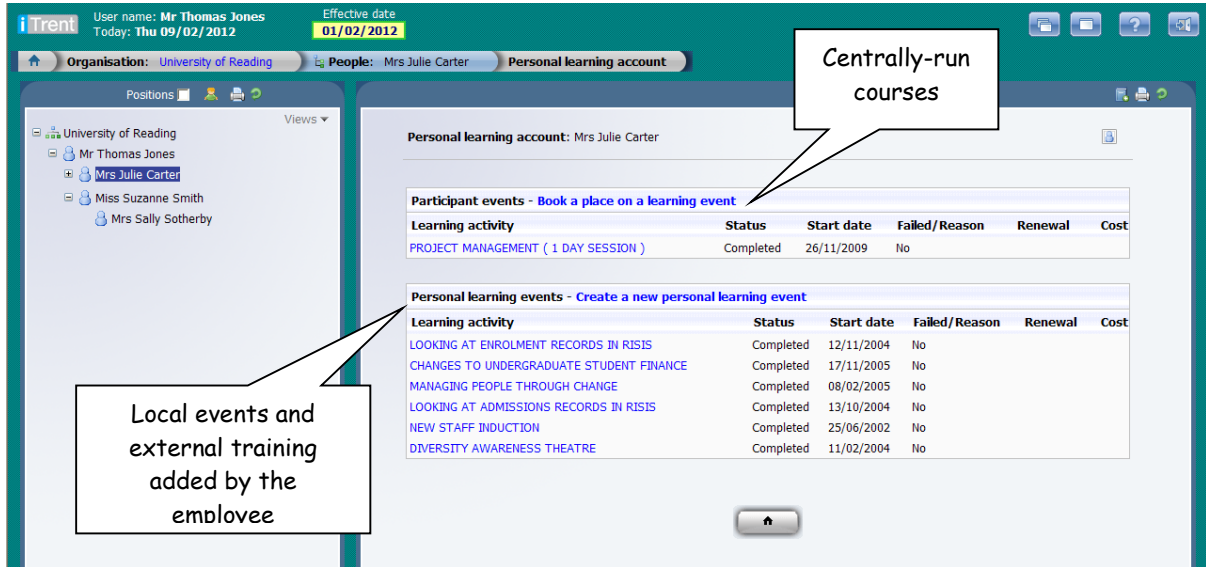
Job title	Post	Organi	Forename	Org. unit	Personal ref.	Position occ. ref.	Position ref. no.	Post	Surname	Reference Occur
hr systems										

Reporting Manager Reports – If you want to check whether any staff in your School/Department are missing a Reporting Manager rather than checking individually, you can run a report from Trent yourself.

## Training & Qualifications

The Personal Learning Account screen shows information on the training courses, internal and external, that the employee has attended. Historical data has been loaded into Trent from previous University training systems.



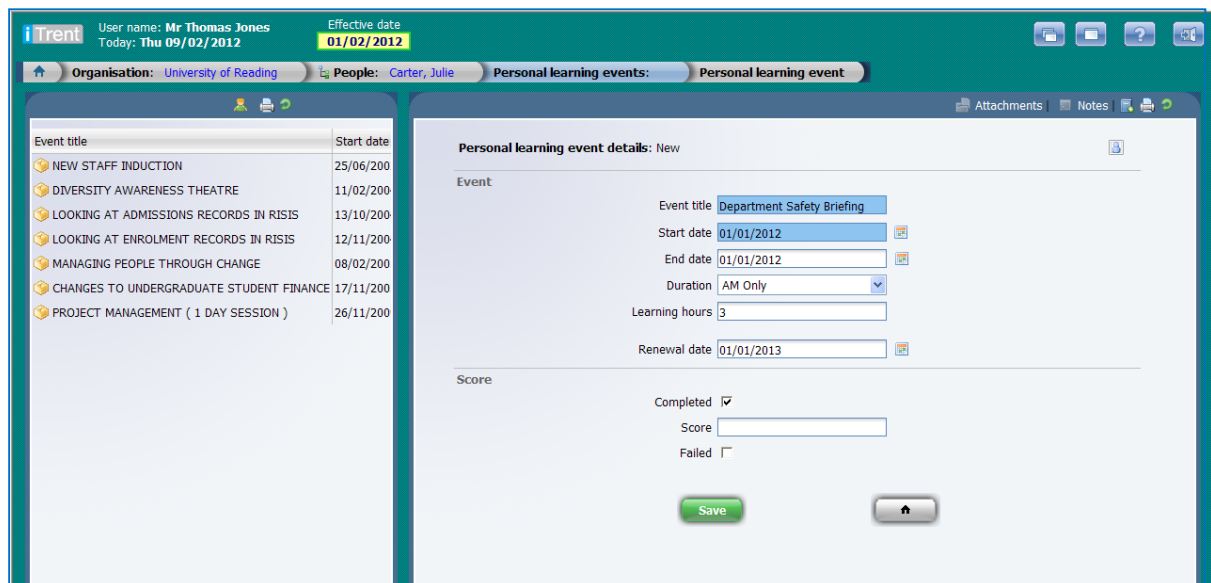


Centrally-run courses

Local events and external training added by the employee

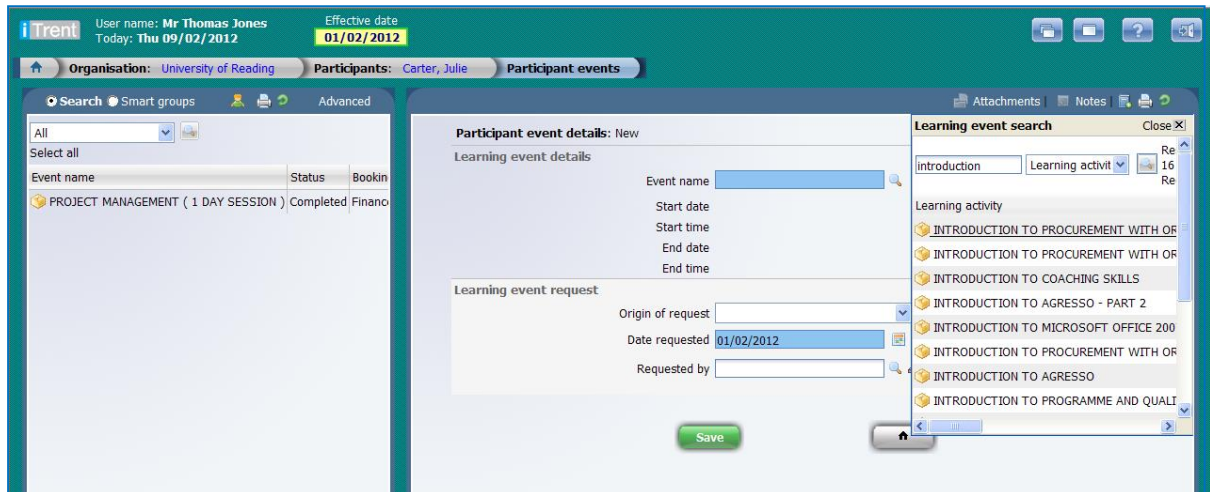
### Add a local training event

It is possible for a manager to add additional training events (such as locally held courses) to their employee's records. Click on 'Add a Local Training Event' on the main Links screen or, whilst in the Personal Learning Account, select 'Create a new personal learning event'.



### Book an employee onto a centrally run course

We encourage staff to book onto centrally-run courses via Employee Self Service but also recognise that some individuals may not be able to access a PC on campus to do this. It is therefore possible for you to book staff onto these centrally run courses by clicking on the 'Book a place on a learning event' link on the Personal Learning Account screen.

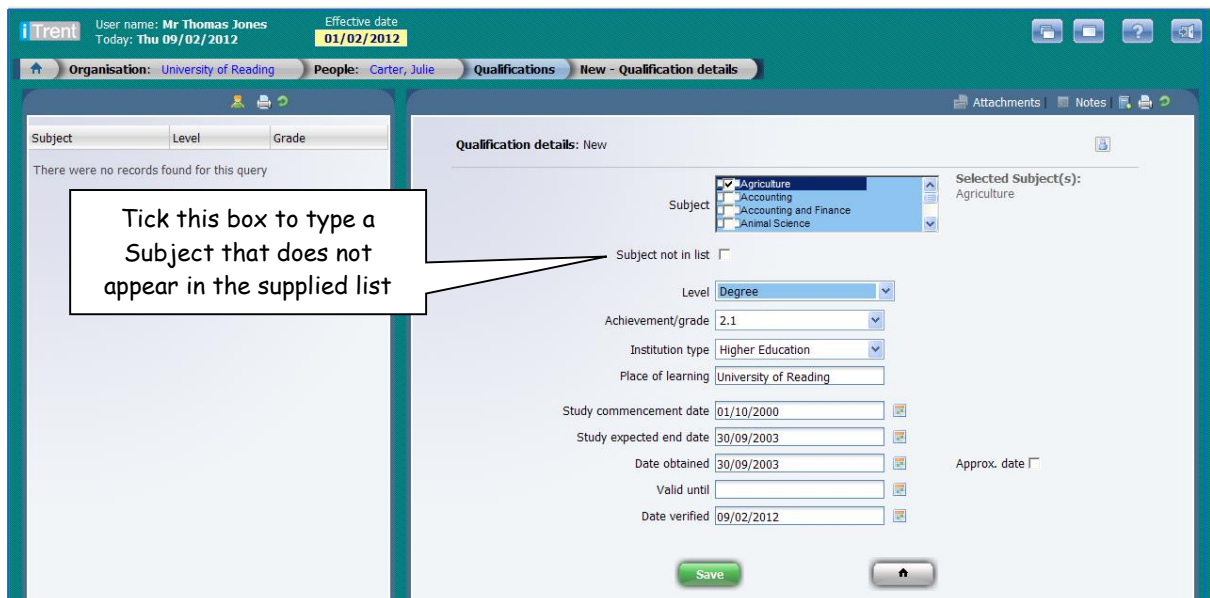


Search for a course using the spy glass icon. You will only be able to select from courses that have available spaces. Select an 'Origin of Request' from the drop-down list and then in the 'Requested by' field you may wish to select the employee's name or your own.

### Qualifications

Again, employees are encouraged to update these themselves via Employee Self Service but on occasion you may wish to add a qualification for a member of your staff.

Click on 'Qualifications' from the main Links page. Select a Subject from the list at the top or alternatively tick the 'Subject not in list' box and type in the name of the subject manually. Complete the rest of the fields as relevant, completing both the 'Study expected end date' and the 'Date obtained' for qualifications that have been completed.



Please note that when a PhD is entered via Employee Self Service the employee is asked to bring their certificate to the HR office. We therefore ask that you complete similar verification when entering qualifications for your staff.

### Professional Memberships

These can also be maintained via Employee Self Service or via People Manager. Please complete the free-text box supplied and also seek verification from the employee.

## Absence

As part of moving to recording annual leave within Employee Self Service (ESS), additional functionality has been added to the People Manager 'School Admin' profile in Trent to help Schools and Departments manage and maintain staff absence records. Some of this functionality is also available to People Managers.



Absence has its own menu section in the Links screen:

- **Absence Calendar** (enabling you to view department absences)
- **Holiday Entitlement** (an overall summary of an employee's entitlement)
- **Credit back a Bank Holiday/Closure Day** (amend an employee's entitlement)
- **Add a personal holiday** (input an absence on behalf of a staff member)

Remember – Trent uses the effective date when displaying data and so make sure that you enter the right date relevant to your search. Use 't' as a quick way to enter today's date.

### Absence Calendar

Sickness, Maternity, Paternity, Adoption and Unpaid Leave have been record in Trent since 1<sup>st</sup> April 2008. The Absence calendar displays all staff absences that have recorded in Trent including:

- Sickness (following completion of USP1 and input into Trent by HR Operations)
- Learning activities
- Bank holidays/University closure days
- Maternity/Paternity absences

The Absence Calendar allows you to view single or multiple employees, and includes annual leave (for Schools/Departments using Employee Self Service to book annual leave).

The display has three sections:

1. Calendar selection options
2. Calendar colour options
3. The Calendar

The Calendar selection options are displayed at the top of the page. The display period can be changed by selecting drop down list items or change to an earlier or later start date using buttons above the calendar.

Additional information

- Half day AM absence - When an absence has been recorded as a Half day – AM the left side of the cell is in the absence colour.
- Half day PM absence - When an absence has been recorded as a Half day – PM then the right side of the cell is in the absence colour.
- Clashing events - When an absence has been recorded that clashes with another absence (A sickness on the same date as a personal holiday for example) the day of the absence will display an exclamation mark. The pop up will display the details of the absences that are clashing.
- Working pattern – the employees working pattern is shown by a thicker line around the box for a given day. Ensure that your staff have the correct working days marked – this is a useful quick overview for seeing if any patterns have accidentally cut across a weekend.

Example: To view the Absence Calendar for multiple employees, hold ‘Ctrl’ and click on each employee’s name in the view pane then select ‘Absence Calendar from the Links page.

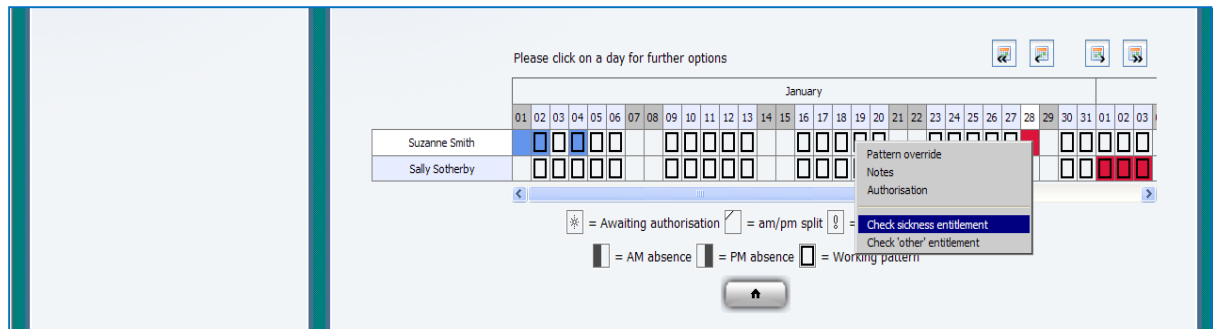
The screenshot shows the 'Absence calendar' interface. On the left, a 'Positions' pane lists employees: Mr Thomas Jones, Mrs Julie Carter, Miss Suzanne Smith, and Mrs Sally Sotherby. A callout box points to this list with the text: "You may view more than one employee at a time". The main area is titled 'Absence calendar:' and contains 'Calendar selection options' with fields for 'Display period' (set to 'Specific date range'), 'Period from' (01/01/2012), and 'Period to' (01/03/2012). Below these are 'Calendar colour options' with checkboxes for Bank holiday, Company holiday, Holiday, Sickness, Learning activity, Other, Maternity / Paternity, Adoption, and Working pattern. A callout box points to the date selection fields with the text: "Use these icons to select the period covered". At the bottom, there is a calendar grid for January with rows for Suzanne Smith and Sally Sotherby. A legend below the calendar explains symbols: a star for 'Awaiting authorisation', a box with a slash for 'am/pm split', an exclamation mark for 'Clashing events', a box with a left half shaded for 'AM absence', a box with a right half shaded for 'PM absence', and a box with a thick border for 'Working pattern'.

You may select the period that the calendar covers using the date fields at the top of the form or the calendar icons.

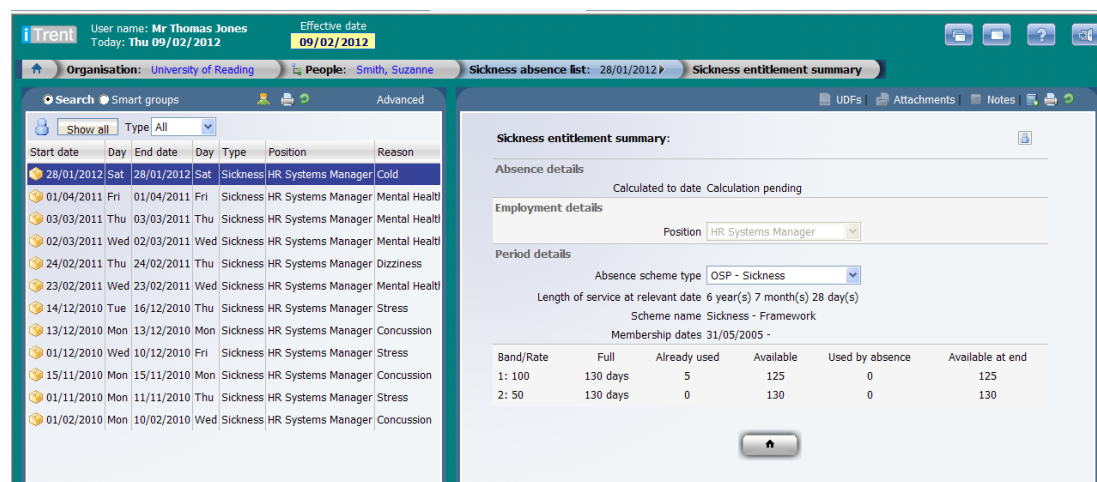
To view further details on a particular absence, hover over the highlighted cell in the calendar.

This screenshot shows the same interface as above, but with a tooltip displayed over a cell in the calendar grid. The tooltip contains the following information: Name: Suzanne Smith, Position(s): HR Systems Manager, Personal reference: 895962, Payroll reference(s): 895962, Day: Saturday, Date: 28/01/2012, Type: Sickness, Period: 28/01/2012 - 28/01/2012, Position: HR Systems Manager (00006032), Occupancy: 01/11/2006 - Reporting: Head of Financial & HR Systems - Financial & HR Systems.

By right-clicking on a particular day in the calendar, the user may opt to view the employee's entitlement summary.



Selecting 'Check sickness entitlement' from this list will open up a new screen.



This screen shows which sickness absence scheme the employee is entitled to as part of their terms and conditions of employment, as well as the days already used in this absence period.

If the employee has more than one Position in the manager's area, it is possible to select the relevant one from the drop-down list. Please contact your HR Operations Administrator for queries on sickness absence.

### Printing the Calendar

You are able to print the Absence calendar by clicking the Print icon at the top of the details page:

- When the calendar is printed to a colour printer then all of the colours displayed will be represented on the print.
- When the calendar is printed to a black and white printer, the colours will either be represented as shades of grey or, they will not be represented at all. If the cell shading is missing then you will need to set an option in your browser to enable the browser to interpret the colours accordingly. This is achieved as follows:

**Internet Explorer:** Click Tools > Internet Options, Advanced Tab, scroll down to Printing, check the Print background colors and images checkbox

**Firefox:** Click File > Page Setup, click Format & Options Tab, in the Options section, check the Print Background (colours & images) checkbox



## Holiday Entitlement

If an employee wants to know their entitlement for the year you need to select the link for **Holiday Entitlement Summary**. This screen will show details of the leave booked by an employee. This includes their annual leave entitlement, all the annual leave they have requested and any bank holidays/ University closure days which have been automatically loaded in to the system (up to two years ahead). Employees do not need to book off bank holiday or closure days as the system automatically calculates these. These will show in an employees scheduled for future dates. In Trent they will show in the Holiday Entitlement Summary screen with the dates pre listed, as below.

From	To	Duration	Remaining entitlement
06/04/2015	06/04/2015	1	18.5
10/04/2015	10/04/2015	1	17.5
04/05/2015	04/05/2015	1	16.5
25/05/2015	25/05/2015	1	15.5
30/07/2015	30/07/2015	1	14.5
31/08/2015	31/08/2015	0	14.5

If someone is off sick during a period of booked annual leave, the holiday can be credited back by the HR team on receipt of the USP1 form if accompanied by a doctor's certificate. The School/Departmental Administrator needs to request this as part of the submission of the USP1.

## Credit Back a Bank Holiday/Closure Day

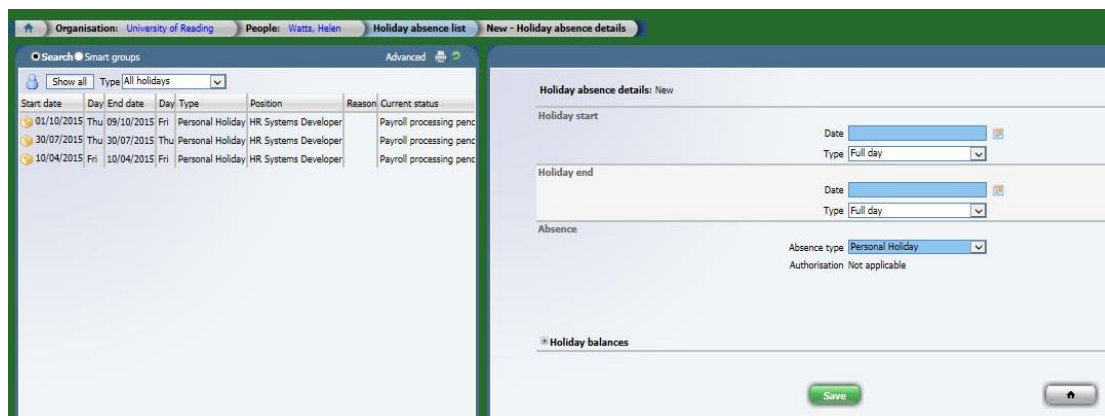
There are occasions where staff at the University may be required to work one of the University Bank Holiday/Closure days (e.g. Sports Park, staff at Greenlands). School Admin users are able to 'credit back' a BH/Closure day that has been automatically deducted at the start of the holiday year.

Start date	Day	End date	Day	Type	Position	Reason	Current status
28/08/2017	Mon	28/08/2017	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
29/05/2017	Mon	29/05/2017	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
01/05/2017	Mon	01/05/2017	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
17/04/2017	Mon	17/04/2017	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
14/04/2017	Fri	14/04/2017	Fri	Bank holiday	HR Systems Developer		Payroll processing pen
12/04/2017	Wed	13/04/2017	Thu	Bank holiday	HR Systems Developer		Payroll processing pen
02/01/2017	Mon	02/01/2017	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
28/12/2016	Wed	30/12/2016	Fri	Bank holiday	HR Systems Developer		Payroll processing pen
27/12/2016	Tue	27/12/2016	Tue	Bank holiday	HR Systems Developer		Payroll processing pen
26/12/2016	Mon	26/12/2016	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
23/12/2016	Fri	23/12/2016	Fri	Bank holiday	HR Systems Developer		Payroll processing pen
29/08/2016	Mon	29/08/2016	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
30/05/2016	Mon	30/05/2016	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
02/05/2016	Mon	02/05/2016	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
29/03/2016	Tue	30/03/2016	Wed	Bank holiday	HR Systems Developer		Payroll processing pen
28/03/2016	Mon	28/03/2016	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
25/03/2016	Fri	25/03/2016	Fri	Bank holiday	HR Systems Developer		Payroll processing pen
01/01/2016	Fri	01/01/2016	Fri	Bank holiday	HR Systems Developer		Payroll processing pen
29/12/2015	Tue	31/12/2015	Thu	Bank holiday	HR Systems Developer		Payroll processing pen
28/12/2015	Mon	28/12/2015	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
25/12/2015	Fri	25/12/2015	Fri	Bank holiday	HR Systems Developer		Calculation pending
24/12/2015	Thu	24/12/2015	Thu	Bank holiday	HR Systems Developer		Payroll processing pen
31/08/2015	Mon	31/08/2015	Mon	Bank holiday	HR Systems Developer		Payroll processing pen
25/05/2015	Mon	25/05/2015	Mon	Bank holiday	HR Systems Developer		Payroll processing pen

Select the BH/Closure date you wish to credit back from the **type** and check the tick box '**not taken**'. The next time that absence processing runs in Trent (usually every night) the extra day of personal holiday entitlement will be reflected to the staff member.

### Add a Personal Holiday

School Admin users are able to enter annual leave on behalf the employee if they have transitioned to using Employee Self Service to request leave. Please note that this should be used in exceptional cases as it will automatically be entered as 'approved'. No authorisation workflow will be initiated to the employees Reporting Manager.



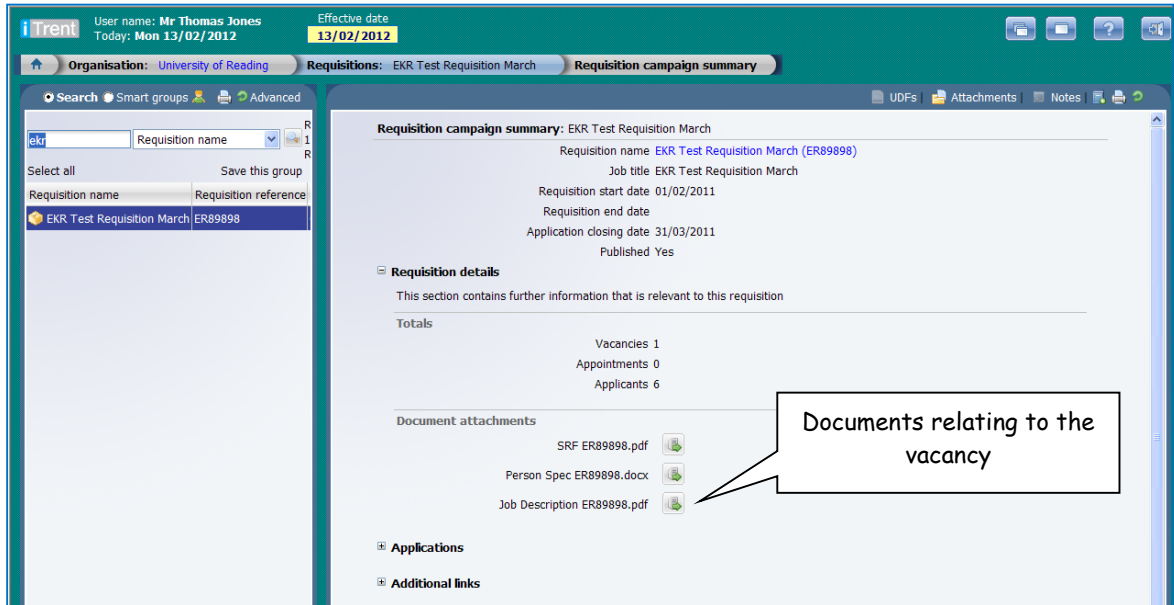
Start date	Day	End date	Day	Type	Position	Reason	Current status
01/10/2015	Thu	09/10/2015	Fri	Personal Holiday	HR Systems Developer	Payroll processing penc	Payroll processing penc
30/07/2015	Thu	30/07/2015	Thu	Personal Holiday	HR Systems Developer	Payroll processing penc	Payroll processing penc
10/04/2015	Fri	10/04/2015	Fri	Personal Holiday	HR Systems Developer	Payroll processing penc	Payroll processing penc

### Recruitment

You are able to view any Requisitions for which you are the Recruiting Manager, or have access to in the organisation structure. **Please note you will only be able to access any Requisitions that began on or after 01/10/2011.**

From the main Links screen click on 'Vacancy Summary'. Type in the name of the Requisition you wish to view, or the Requisition reference which you will have been provided by Human Resources. You may use '\*' before a word to perform a wildcard search. **Please do not run a blank search as this may take a long time.**

This screen will show you summary data and links to the SRF, Job Description and advert:



**Requisition campaign summary: EKR Test Requisition March**

Requisition name: EKR Test Requisition March (ER89898)  
 Job title: EKR Test Requisition March  
 Requisition start date: 01/02/2011  
 Requisition end date:  
 Application closing date: 31/03/2011  
 Published: Yes

**Requisition details**  
 This section contains further information that is relevant to this requisition

**Totals**

Vacancies: 1  
 Appointments: 0  
 Applicants: 6

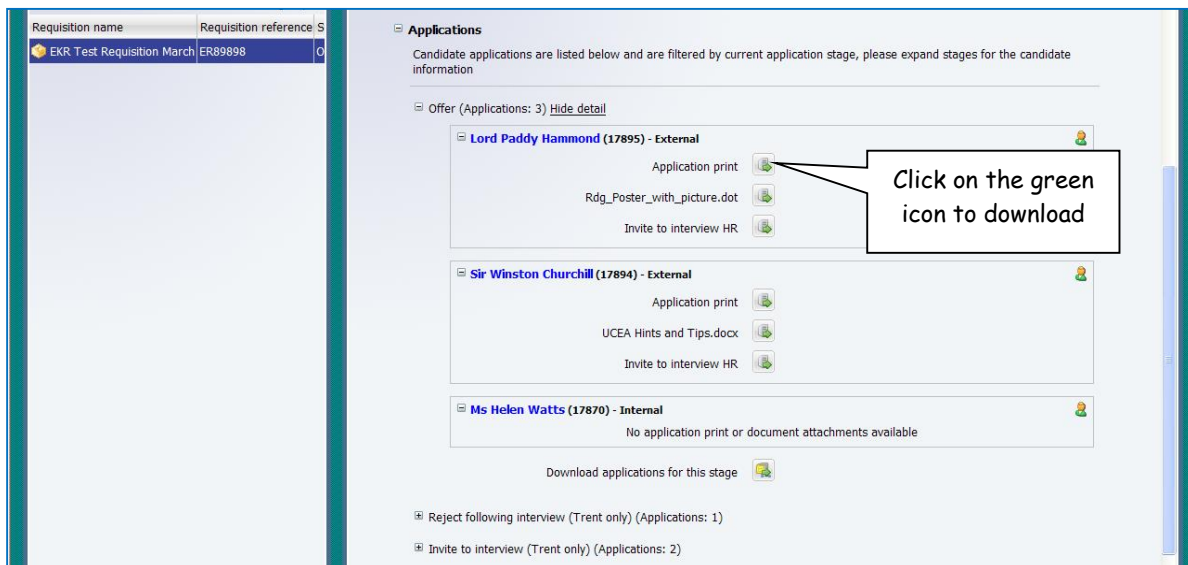
**Document attachments**

- SRF ER89898.pdf
- Person Spec ER89898.docx
- Job Description ER89898.pdf

**Applications**

**Additional links**

You may also view a list of all applicants, and download their application form and any attachments:



**Applications**

Candidate applications are listed below and are filtered by current application stage, please expand stages for the candidate information

**Offer (Applications: 3) Hide detail**

- Lord Paddy Hammond (17895) - External**
  - Application print
  - Rdg\_Posters\_with\_picture.dot
  - Invite to interview HR
- Sir Winston Churchill (17894) - External**
  - Application print
  - UCEA Hints and Tips.docx
  - Invite to interview HR
- Ms Helen Watts (17870) - Internal**
  - No application print or document attachments available

Download applications for this stage

Reject following interview (Trent only) (Applications: 1)

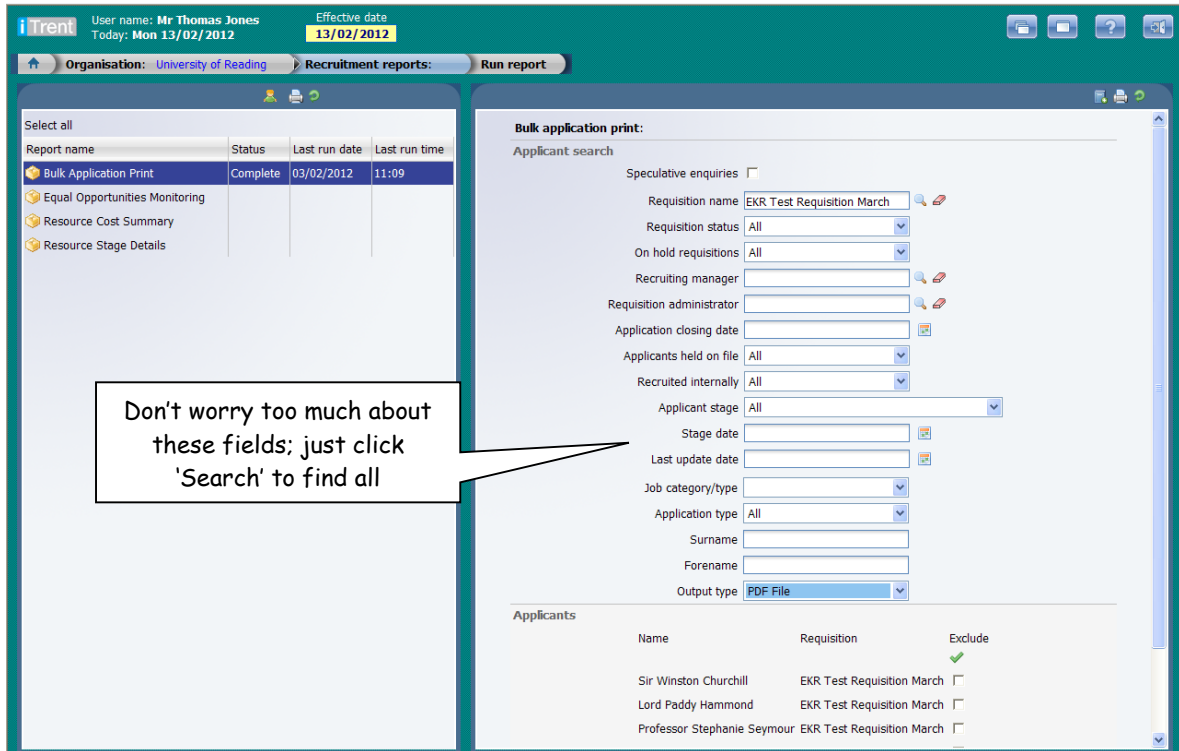
Invite to interview (Trent only) (Applications: 2)

**Bulk Application Print**

To print out all application forms at once (not including the attachments), click on Bulk application print in the 'Additional Links' section. Click 'Search' and a full list of all Applicants will appear. You may exclude any from the print at this stage by clicking the checkboxes to the right of the form. Once you are happy with your selection, click 'Run' and the process will run as a report in the background. You will receive a message when the process is complete.

The forms will be merged into a single PDF file which can then be printed out or emailed to panel members as appropriate. You will need to print out any attachments separately from the Vacancy Summary Form.





Effective date: 13/02/2012

Organisation: University of Reading

Recruitment reports: Run report

**Bulk application print:**

Applicant search

Speculative enquiries

Requisition name: EKR Test Requisition March

Requisition status: All

On hold requisitions: All

Recruiting manager: [ ]

Requisition administrator: [ ]

Application closing date: [ ]

Applicants held on file: All

Recruited internally: All

Applicant stage: All

Stage date: [ ]

Last update date: [ ]

Job category/type: [ ]

Application type: All

Surname: [ ]

Forename: [ ]

Output type: PDF File

Applicants

Name	Requisition	Exclude
Sir Winston Churchill	EKR Test Requisition March	<input checked="" type="checkbox"/>
Lord Paddy Hammond	EKR Test Requisition March	<input type="checkbox"/>
Professor Stephanie Seymour	EKR Test Requisition March	<input type="checkbox"/>

### Short listing and Processing

You are able to record your shortlist of applicants or progress applications on the system by clicking on 'Requisition processing' on the Vacancy Summary form.



Effective date: 09/02/2012

Organisation: University of Reading

Requisitions: EKR Test Requisition March

Requisition campaign summary

Search Smart groups Advanced

Requisition name: EKR

Requisition reference: ER89898

**Requisition campaign summary: EKR Test Requisition March**

Requisition name: EKR Test Requisition March (ER89898)

Job title: EKR Test Requisition March

Requisition start date: 01/02/2011

Requisition end date: [ ]

Application closing date: 31/03/2011

Published: Yes

**Requisition details**

**Applications**

**Additional links**

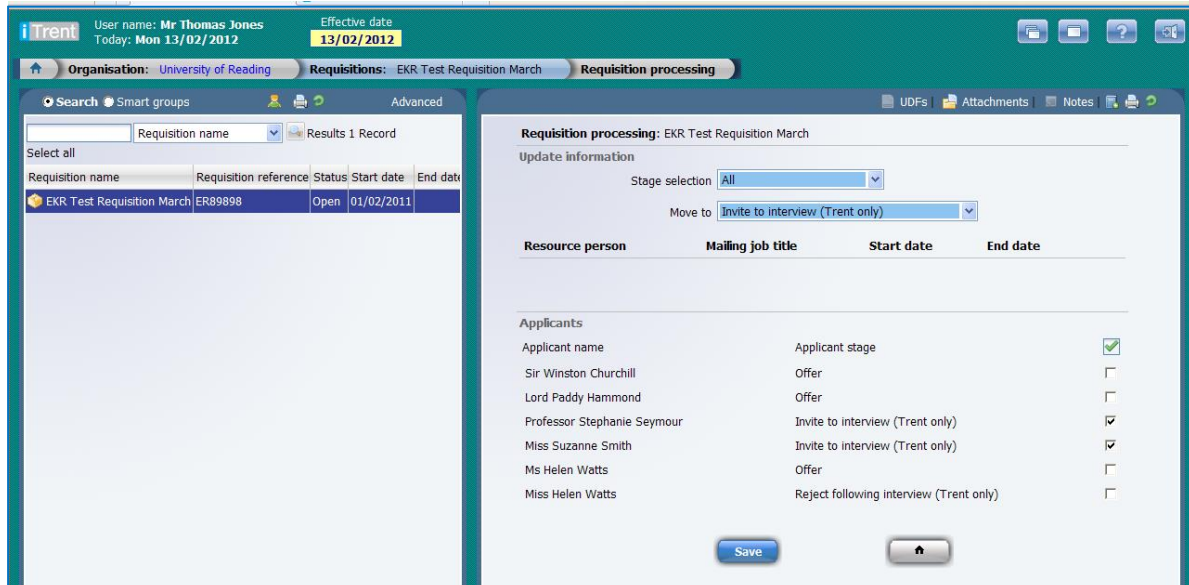
This section contains additional navigation links

[Bulk application print](#)

[Requisition processing](#)

Click here for Requisition processing

Selecting 'All' from the 'Stage Selection' drop-down list will produce a list of all people that have applied for this vacancy.



The screenshot shows the iTrent interface for 'Requisition processing'. The user is Mr Thomas Jones, and the effective date is 13/02/2012. The requisition is for 'EKR Test Requisition March' with reference ER89898, status 'Open', and start date 01/02/2011.

The 'Update information' section includes a 'Stage selection' dropdown set to 'All' and a 'Move to' dropdown set to 'Invite to interview (Trent only)'. Below this is a table for 'Resource person' with columns for 'Mailing job title', 'Start date', and 'End date'.

The 'Applicants' section lists the following:

Applicant name	Applicant stage	
Sir Winston Churchill	Offer	<input type="checkbox"/>
Lord Paddy Hammond	Offer	<input type="checkbox"/>
Professor Stephanie Seymour	Invite to interview (Trent only)	<input checked="" type="checkbox"/>
Miss Suzanne Smith	Invite to interview (Trent only)	<input checked="" type="checkbox"/>
Ms Helen Watts	Offer	<input type="checkbox"/>
Miss Helen Watts	Reject following interview (Trent only)	<input type="checkbox"/>

Buttons for 'Save' and a home icon are visible at the bottom.

Tick the checkbox next to anyone you wish to progress through the recruitment cycle and then select the relevant stage from the 'Move to' drop-down list. Click 'Save'.

**NB: Please ensure that you also complete the hardcopy shortlisting form as normal in addition to this screen. We still require you to retain notes of your shortlisting decisions.**

### Offers

Once you have completed the interview stage you can come back to this screen and move the successful applicants to 'Offer' and reject all others.

When you move any applicant to Offer you will receive an email reminding you to send the Chairperson's report to HR who will then produce a written offer and contract of employment. Your Recruitment Administrator will also receive an email to let them know that the Requisition has been progressed to Offer stage.

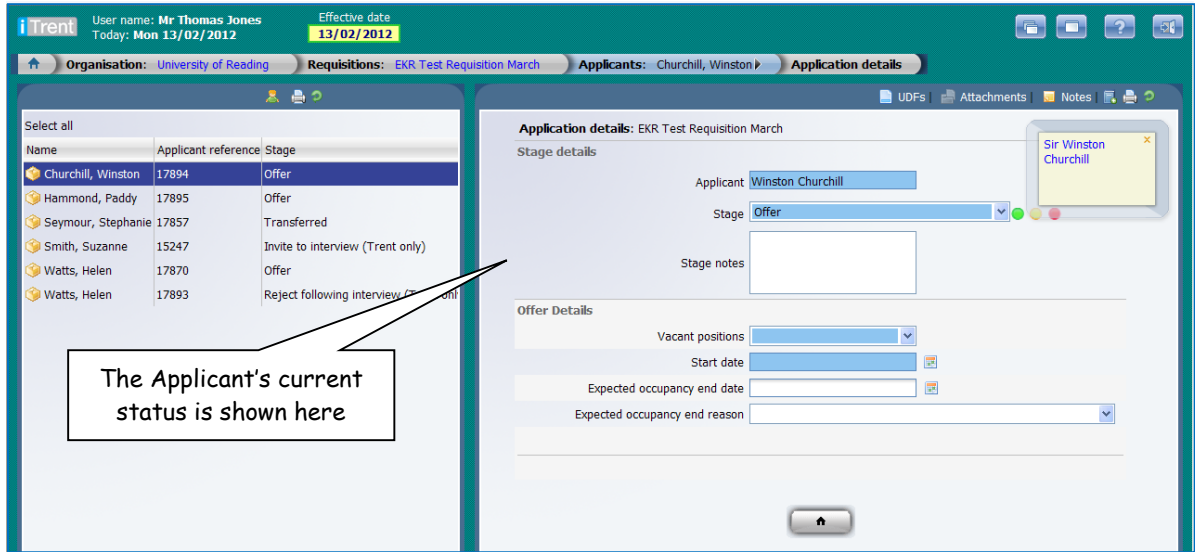
### Recruitment Reports

HR Systems are working on producing a Recruitment summary report which will be sent to all Recruiting Managers after a vacancy has closed. The report will utilise the information that has been input during the short listing and interview stages to provide managers with an overview of the campaign and breakdown of where applicants originally saw the advert.

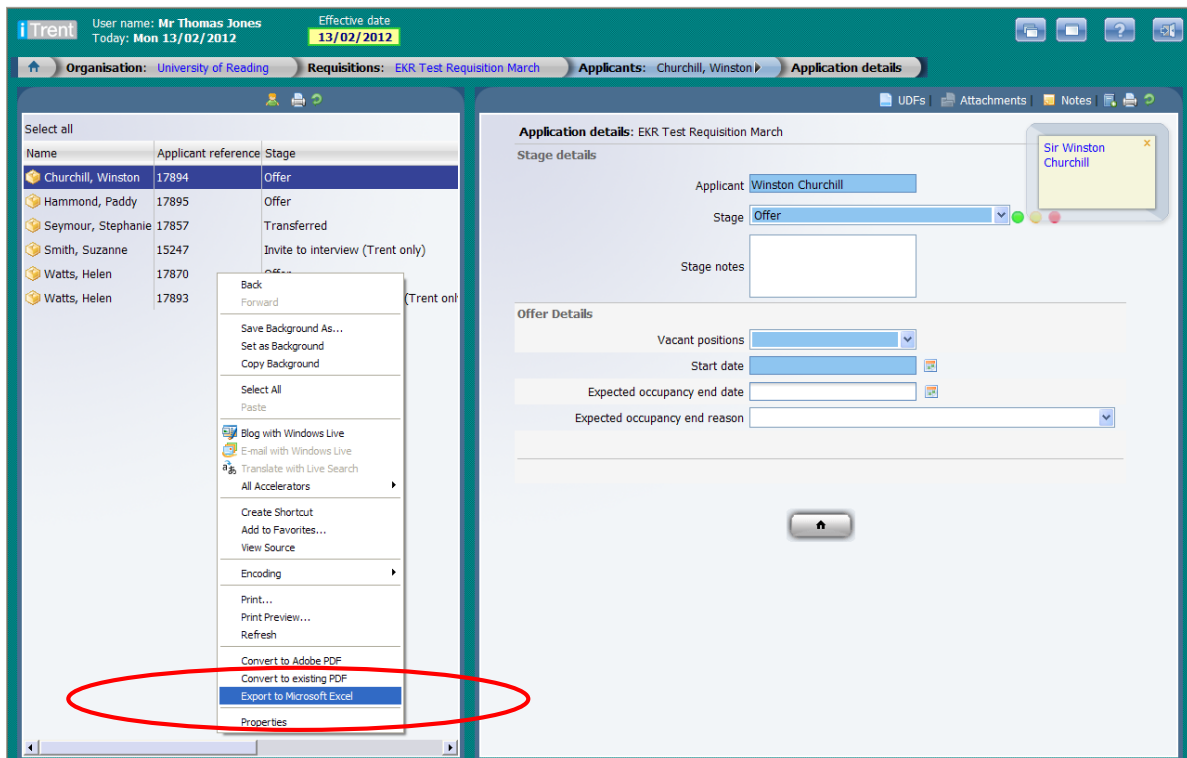
Information on Trent by managers and administrators during the campaign will also aid us in producing annual diversity monitoring returns and information for other purposes, such as Athena SWAN.

### Applicant Lists

You may find it useful to be able to retrieve an electronic list of applicants which you can then transfer to a short listing document or print out. To do this, select the 'Applicant List' link from the main links screen. A list of Applicants for this Requisition will appear on the left-hand side of the screen. Highlight any of these names to view the current status of that person's application.



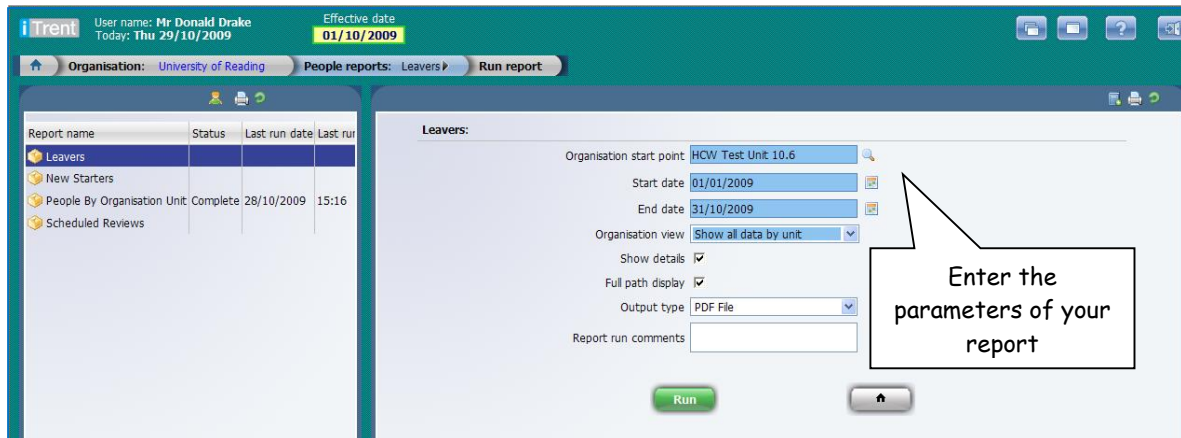
Right-click on the list of Applicant names in the left-hand pane and then select 'Export to Microsoft Excel' from the menu.



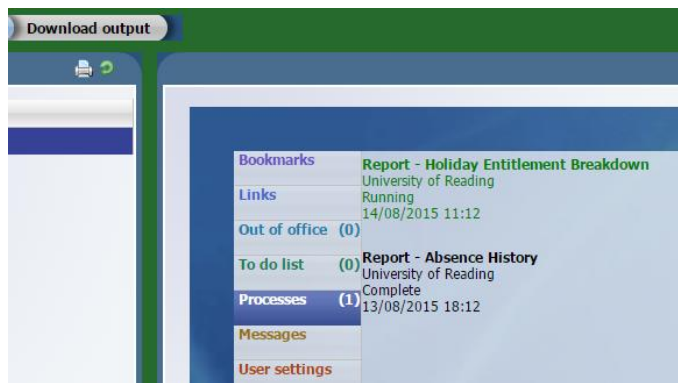
Once you have the list of names in Excel you can copy and paste it into other documents or print out as required.

## Reports

Several simple reports are available to managers from the Reports section of the Links page. Click on People, Structure or Absence Reports and you will be prompted to select a report from a list. Complete the parameters for the report and select the desired output format, then click Run.



You may navigate away from this page, or log out of Trent completely, whilst the report is running. Once the report is complete you will receive a message at the bottom-right of the Trent screen and you will also be sent an email. You can also see the status of the report within **Processes**.



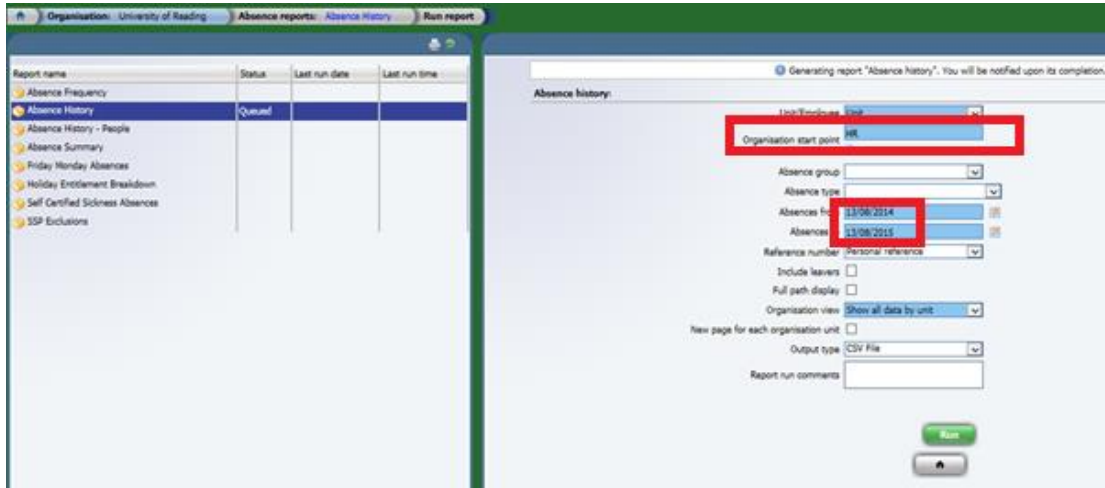
From the Links page, click on 'Download Report Output' to view the results of the report you have generated.

### Absence Reports

There are a number of absence reports available for Schools and Departments that are live using Trent to record annual leave. In particular:

- **Holiday entitlement breakdown** (this shows the overarching entitlement and details any carry over (called B/F) applied);
- **Outstanding holiday** (this shows the original entitlement for the year, amount taken, scheduled and outstanding).

Remember: When running reports, always put in your own unit level rather than leaving at UoR level otherwise it will take a long time to run.



Reports can be run as a PDF or as a CSV format (which can be saved as an .xls).

Trent university of reading

### Outstanding Holiday Entitlement

Effective Date:	01/10/2015	Organisational Start Point:	Legal Services
Scheme:	All Schemes	Organisation View:	Full
For outstanding entitlements >=	0.00 Days or 0.00 Hours	Path Display:	Partial
Employee Name:	All	Reference No:	Personal

	Scheme Name	Unit	End of Holiday Yr	Entitlement	Taken	Scheduled	Outstanding
<b>Legal Services</b>							
Advisor; Reference Number:							
	Holiday - Grade 6 and above Hours	Hours	30/09/2016	224.00	0.00	77.00	147.00
legal; Reference Number:							
	Holiday - Grade 6 and above Days	Days	30/09/2016	40.00	0.00	14.00	26.00

### Outstanding Holiday Report

- **Scheme Name:** This shows which grade related days/hours scheme has been applied to the staff member. Staff who work less than 5 days a week or who work different hours each day will be on an hours scheme.
- **Unit:** This displays whether the entitlement is calculated in hours or days.
- **End of holiday yr:** displays the annual leave year the entitlement relates to.
- **Entitlement:** Absence entitlement in Trent is made up of the total of BH/Closure Days and personal entitlement. This is displayed as a decimal therefore 103.30 hours equates to 103 hours 18 minutes. Having the whole entitlement as the starting point for a leave year is quite a different way of thinking about leave for full timers at UoR as we normally just think about 21, 25 or 26 days not 35, 39 or 40.
- **Taken:** This is any leave (whether BH/Closure/Personal holiday) that has occurred in the past (from today's date).
- **Scheduled:** This is any entitlement that has been deducted already, but occurs in the future. At a start of a holiday year, when no personal holiday requests have been made, this will display BH/Closure deductions only e.g 14 for a full time staff member.
- **Outstanding:** This will give the outstanding balance to be used for personal holiday bookings. At the start of a holiday year, when no requests have been made, this is the bookable leave entitlement. E.g 26 days

If you require reports that are more complex or contain further detail then please contact the HR Systems Team who will be happy to help.

### Contacts

- Please contact [HR Operations](#) for any queries you might have on an employee's details such as job title, reporting line, working pattern, hours, salary or absence or recruitment queries.
- Please contact the [HR Systems Team](#) if you require a report or have a specific technical query relating to Trent.