

Guidance Note

Amending/Transferring a Unit/Post/Position

You can request a new unit/post/position be amended or transferred within the structure in iTrent by completing this form. If there is a Re-structure with numerous changes please speak to the Workforce Systems & Analytics Team in the first instance to advise on the information required. Please refer to the quick guide at the bottom of the page for assistance with the structure terminology.

Request to amend/transfer a Unit/Post/Position	
To be completed by a HR Business Partner or FSS Manager	
Effective Date	Please select the effective date for the amendment/transfer.
Request to	Please select if you wish to make an amendment or a transfer.
The current	Please select if you wish to make the change to the current Unit, Post or Position.
Current Service	Please select the current Service in the Structure where the Unit/Post/Position sits.
New Service	Please select the new Service in the Structure where the Unit/Post/Position will sit. If it is staying in the same service then please select the existing Service.
Amendments:	
Brief description of the amendment	Please provide a brief description of the amendment.
New unit/post information (if new designation)	Please enter the new name of the Post/Unit. For a Re-designation there must not be any other changes to T&C's or Payscale. For such changes you need to end the old Position/Post/Unit and create a new one.
Change to Post Budget hours (if any)	Please enter new Post Budget Hours if there has been a change to the Overall Establishment Hours.
New Grade	Please enter the new Grade. This should be used when a Post/Position has been through the Job Evaluation process and the JE code should also be entered.
Job Evaluation Code	
Costing	Please select from the drop down box if the costing will be different from the current Unit/Post/Position.
Address of Unit/Post/Position	Please enter the Address and Postcode for new Unit/Post/Position. There are occasions where an Address may not be required at Unit level. Therefore this can be entered at Sub Unit or Post level depending on the circumstances.
Reporting Manager	Please enter the full name and employee number of the Line Manager who will have myTeam responsibilities for the Positions if changing.
Transfer to – please insert receiving Post number	If a Position is transferring please enter the Post number where it is moving to. If a Post or Unit is transferring please enter the Unit number where it is transferring to.

**Change to old Post
Budget Hours**

If a Position or Positions have moved elsewhere in the Structure but some remain in the original place then the Post Budget Hours will have changed therefore please enter the total here for the old Post.

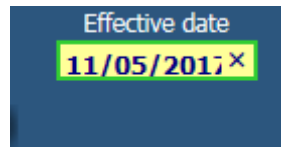
**Change to new Post
Budget Hours**

If a Position or Positions have moved elsewhere in the Structure then the Post Budget Hours will have changed therefore please enter the total here for the new Post.

Quick Guide – Structure Terms


How to find Structure information in iTrent



In iTrent select Organisation explorer to view the structure. You will be required to select the date you wish to view the Structure. If it is today's date you can type in the letter T or type in the required date. You can also double click to bring up the calendar. Once you have the correct date press Enter.







Next you need to drill down to find the area you require. For example:

North Lanarkshire Council>North Lanarkshire Council>Infrastructure>Asset & Procurement Solutions>Facility Support Services>Area 1

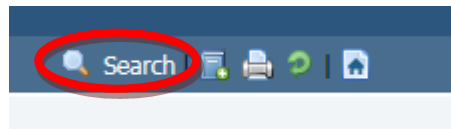
When selecting the above you should click on the  next to each heading to open it. You can open all the sub units from within by pressing the Ctrl button at the same time.

  Catering - Chryston High School This is known as a Unit

  Assistant Cook 194 days This is known as a Post (table)

  Cleaner 38 Weeks
  Cleaner 38 Weeks This is known as a Position (chair). If it is green then it is vacant and if it's blue then it's filled.

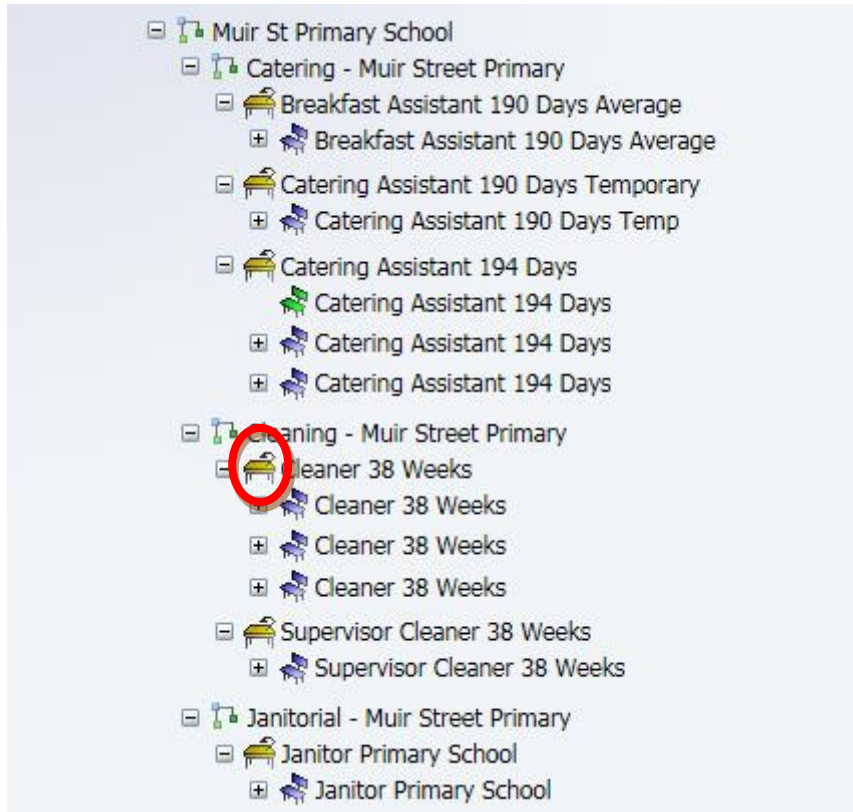
You can search in your area in the explorer for a particular name, premise or position number etc by using



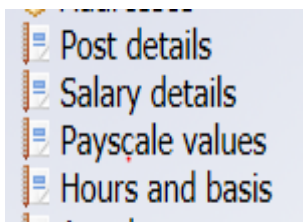
the search button up the top right of the page.

Checking the Unit/Post/Position Number, Hours and Grade on the Structure

You can check your Budgeted Hours and number of Posts/Positions within by using the method above to access the Unit/Post/Position.



You can click on the post (table) for Cleaner 38 weeks and the options below appear:



Post Details will give you the Post number.

Payscale values = you will be able to view the current Grade & Spinal Column Point.

Hours & Basis = you will be able to view the Post Budget Hours for this Post.

The same can be done to check the Units and Positions.

Inheritance

Please note: information held at Unit level is inherited at Post level which is then inherited at Position level. If you require a change at Unit level then this will filter to Post and to Position.