OnBase User Guide - How to add/change Academic Adviser Information in iTrent

This guide is a resource for Department/School Managers and Pathway to Permanency Co-ordinators in Academic Departments, on how to add Academic Adviser information to iTrent.

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Instructions using Department Manager access to iTrent

1. Log in to iTrent using your Department Manager role.

2. Click on Employee Information
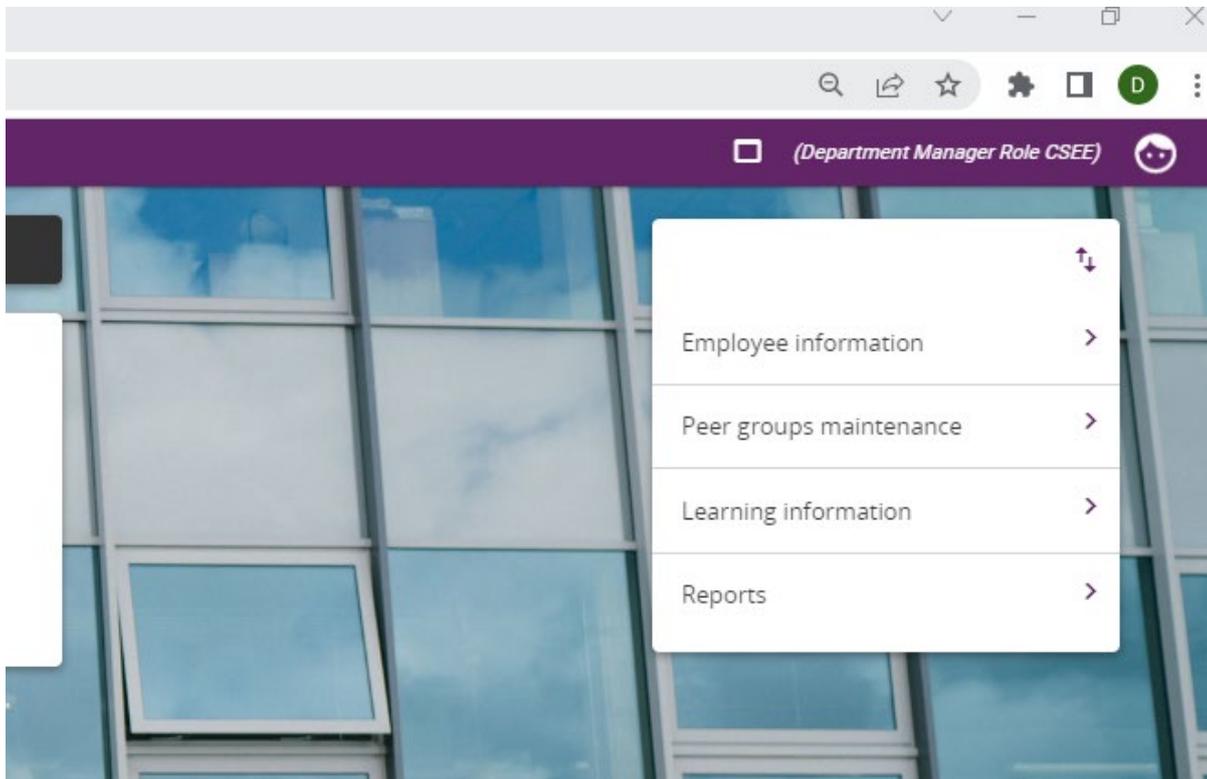
3. Enter the employee's surname and then select the search icon 🔍
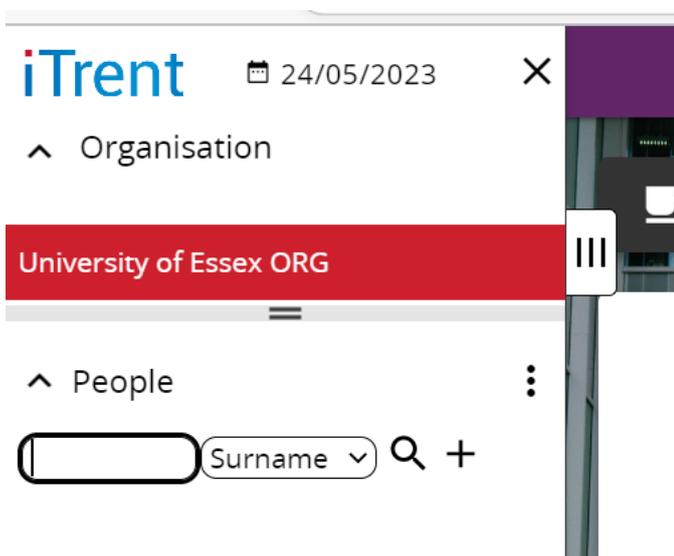
4. Click 'Academic adviser' details
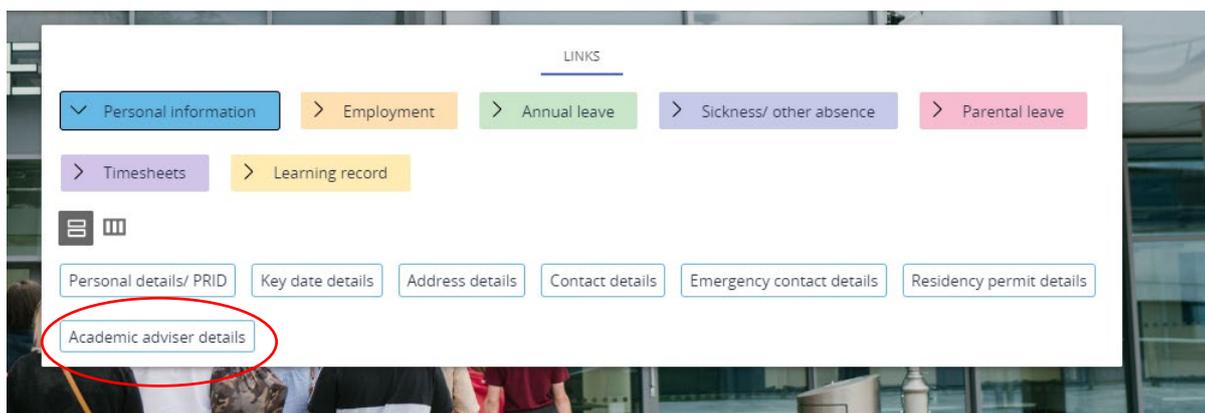
5. Select Academic Adviser from the list of UDF categories

6. Enter the name of the Academic Adviser and the start date of the new employee in their Academic role and then select Save. Do not enter an end date unless you are closing a current Adviser and adding a new one.
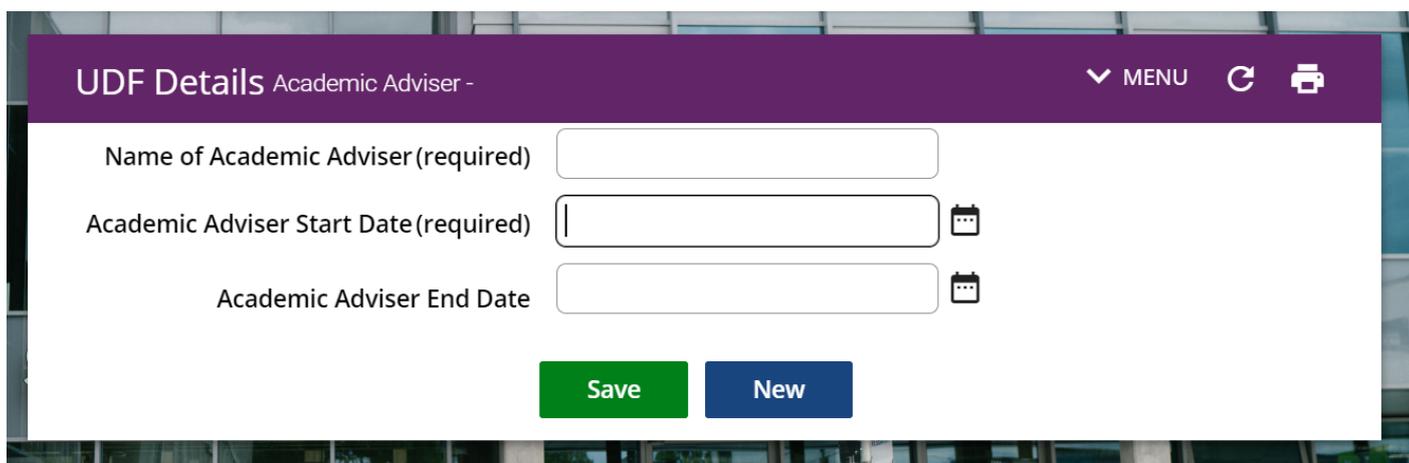
Please note, the name of the Academic Adviser must be entered exactly as their name is displayed in iTrent (without the prefix, i.e. Dr, Ms etc.), you cannot add abbreviated or known as names.

You can check the Academic Advisers correct name in iTrent as follows:

Select Employee Information from the menu:
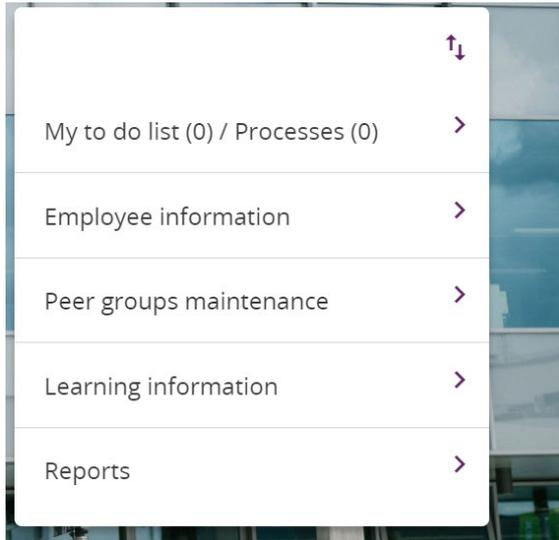
Type the surname of the Adviser in the search box and select search 🔍

You can also search by personal reference, which can be useful if the person uses a 'known as' surname.
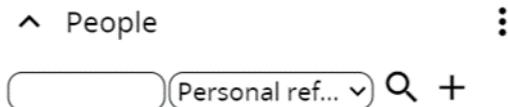
Select the person you want, if there is more than one person with the same surname, and the screen displayed will show the correct name in iTrent at the top, as illustrated below.

7. If the employee's Academic Adviser changes at any time during the Pathway to Permanency process, please add an end date to the original Adviser UDF and create a new Academic Adviser UDF.

Instructions using Academic Adviser access to iTrent

1. Log in to iTrent using your Academic Adviser role.

2. Click on People

3. Enter the employee's surname and then select the search icon 🔍
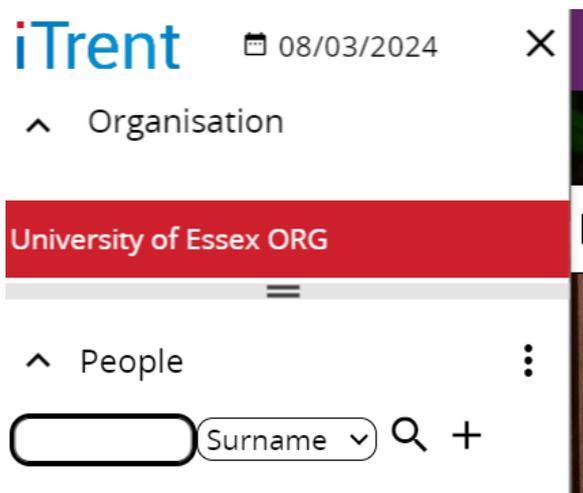
4. Select Add new or Update as appropriate
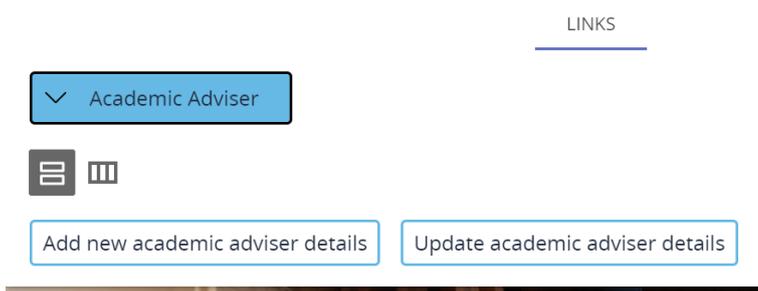
5. If you are adding a new Adviser, enter the name of the Academic Adviser and the start date of the new employee in their Academic role and then select Save. Do not enter an end date.
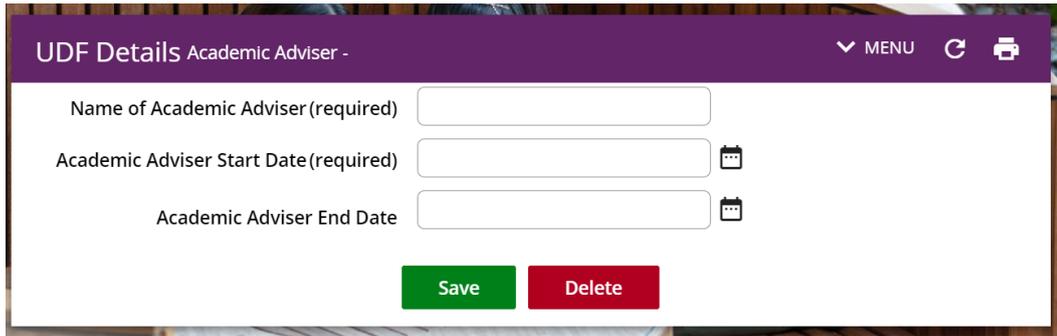
Please note, the name of the Academic Adviser must be entered exactly as their name is displayed in iTrent (without the prefix, i.e. Dr, Ms etc.), you cannot add abbreviated or known as names.

You can check the Academic Advisers correct name in iTrent as follows:

Select People from the menu:
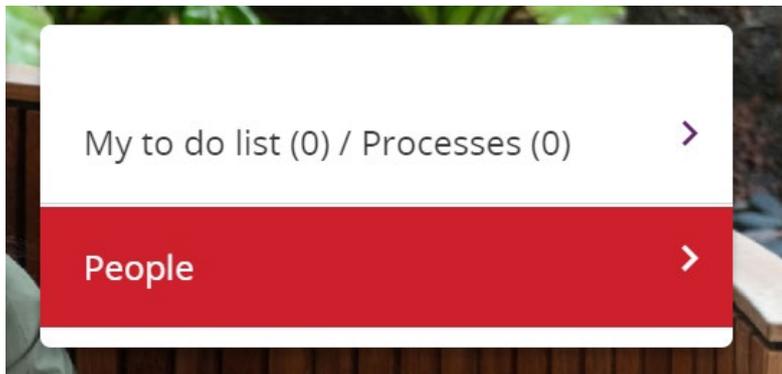
Enter the Adviser's surname and then select the search icon 🔍
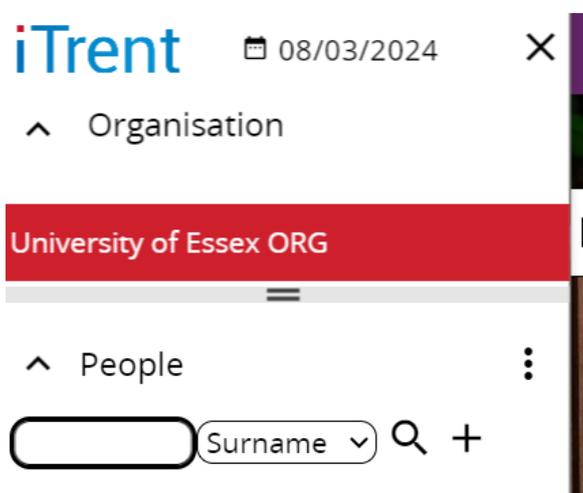
Type the surname of the Adviser in the search box and select search 🔍

You can also search by personal reference, which can be useful if the person uses a 'known as' surname.

Select the person you want, if there is more than one person with the same surname, and the screen displayed will show the correct name in iTrent at the top, as illustrated below.
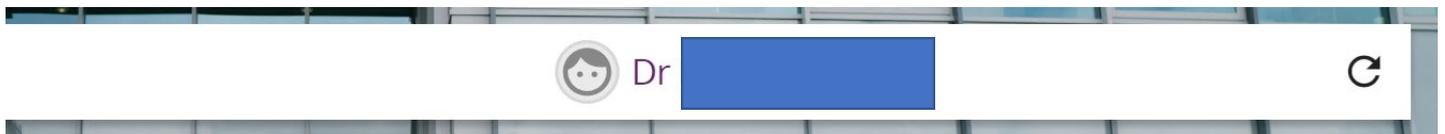
6. If you are updating the Academic Adviser, enter an End Date for the previous Adviser:
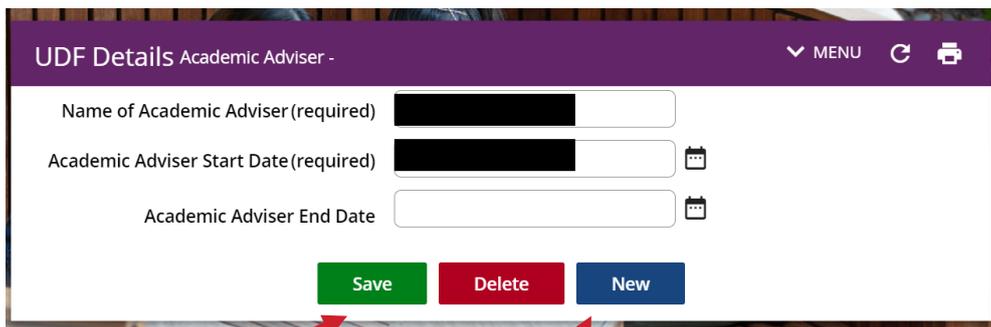
Then Save the UDF and then select New and add the new Adviser details as explained in point 5.