

**iTrent Electric
Manager Self Service
User Guide**

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1. Introduction to Electric

iTrent Electric is the new upgraded version of the Council's HR & Payroll system. You will still be able to access the following on iTrent Electric:

- Position details
- Occupancy details (details of any contractual fixed term end dates)
- Hours and basis (contractual working hours and employment status)
- Grade information (details of the pay grade with minimum and maximum spinal column points)
- Working pattern
- Enter sickness/permissible absence details
- Holiday balances / view adjustments
- Approve holiday requests

Data Protection

Manager Self Service will only give you access to information related to staff who report to you. It is essential that you follow the council's Data Protection Policy when accessing staff details – please take the time to read the policy for a reminder of your responsibilities.

Important Security Information

The Council's Manager Self Service tool contains highly sensitive personal information about your employees and it is important that you use it responsibly and securely. If at any point you feel that your information security may have been compromised you should contact the IT helpdesk IT.serviceline@eastdunbarton.gov.uk or call 0141 578 x8888.

When you have finished using Manager Self Service please always ensure that you log out. To do this click on the face icon on the top right hand side of the screen.

2. Finding your way about/Navigation

Manager Self Service is still accessible through the iTrent icon within EDC Apps.

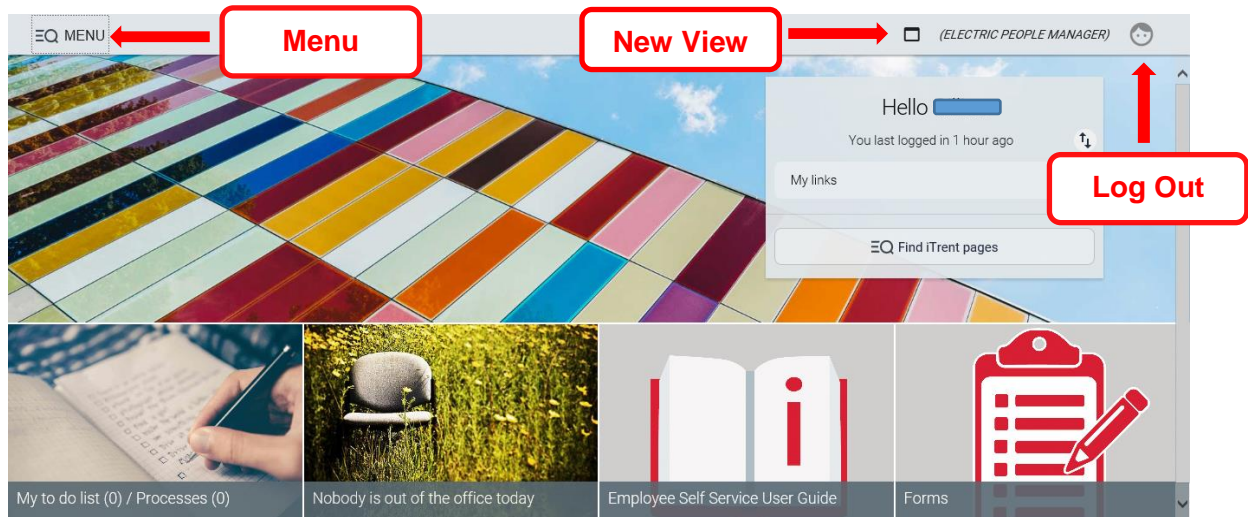
Your username and password is the same as the network username and password you use to log into your PC or Laptop.

If you are experiencing technical problems logging on please contact the IT helpdesk. IT.serviceline@eastdunbarton.gov.uk or call 0141 578 x8888.

Access to the system is based on roles. The role you are allocated determines which parts of the system you can access, what you can see and whether you can update fields or simply view them.

The Homepage

All information is accessed through the homepage, which is the first screen you will see once you log in.



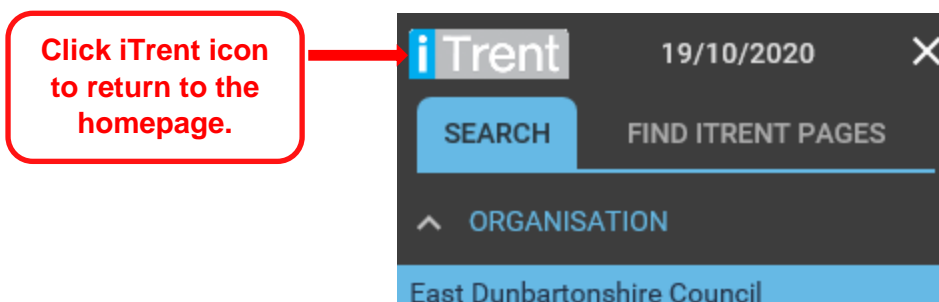
The Homepage Explained:

Menu: Clicking on **menu** will bring up a panel on the left hand side of your screen. This will give you two options: Search and Find iTrent Pages.

Search – allows you to search on iTrent.

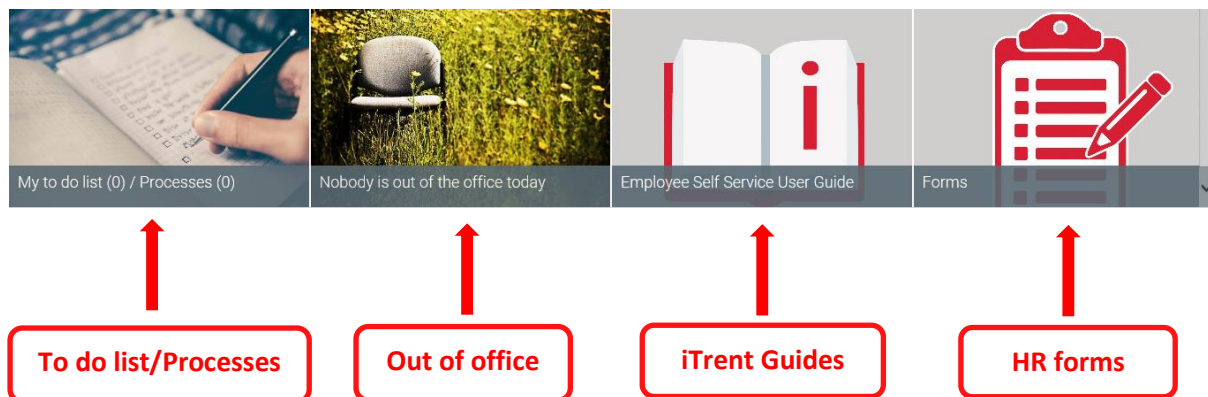
Find iTrent Pages – this gives you a list of your most visited pages.

If you want to return to the homepage click in the iTrent icon on the top left hand side of the menu panel.



New View: Click this to open a new tab. You are able to have multiple views open without having to log back in, the new view will automatically duplicate the page you were on when you opened a new view. If you log out from one view it will log you out from all the open tabs.

At the bottom of the homepage you will see Company News which is currently being developed with links and guides.



To do list/Processes: Shows tasks that require to be actioned in your role as a Manager for example; if a member of your team has requested annual leave it will show here for you to authorise.

Out of office: This area will show when one or more of your reportees are shown as absent (due to sickness, holiday or a learning event).

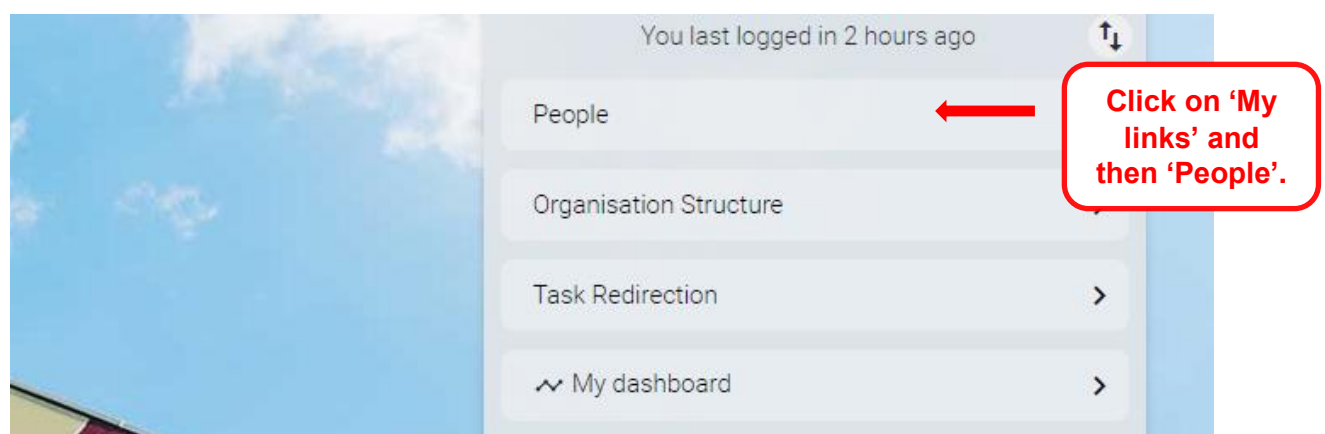
Employee User Guide: link to the user guide for MSS (Manager Self Service, and also ESS (Employee Self Service).

Forms: Link to HR forms which are saved on The Hub.





Dashboard: View of Absence details for your reportees.

Searching for an employee

To search for an employee on iTrent Electric click on My Links and select People



A list of your direct reportees will appear on the left, these can be filtered by Unit etc by clicking on the up/down symbols.

Name	Unit	Job title	Sex	Date of birth
	Baldernock Primary	Janitorial Assistant		
	Baldernock Primary	Team Leader Cleaning		
	Baldernock Primary	Facilities Assistant Day Cleaning		
	Baldernock Primary * Craighead ...	Facilities Assistant Catering * Te...		

You can also search for other employees in your Team who are not direct reportees using the name search.

Search for employees here.

iTrent

19/10/2020

×

SEARCH

FIND ITRENT PAGES

^ ORGANISATION

East Dunbartonshire Council

^ PEOPLE


Results 5 People


Surname


▼


🔍


Save this group

 Kenobi, Obi

 Leia, Organa

 Skywalker, Luke

 Solo, Han

 Vader, Darth

Using this drop down menu you can change how you want to search e.g. surname, forename, NI number or reference number.

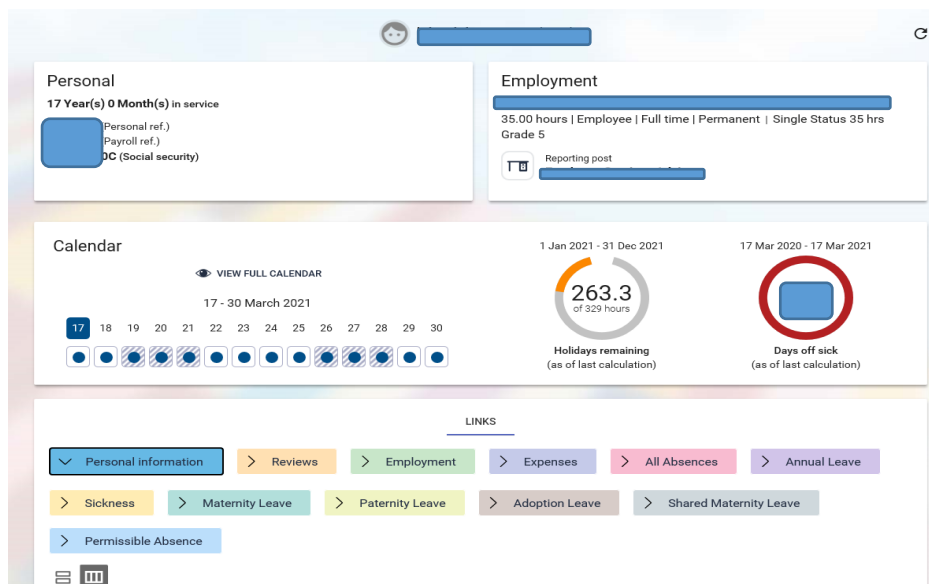
A list of your direct reportees will automatically appear.

6

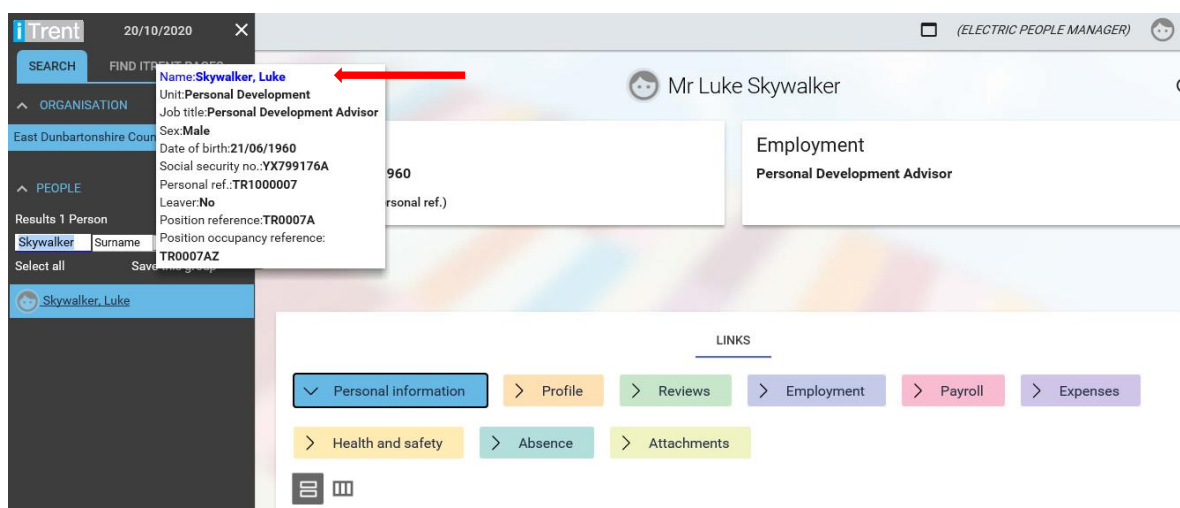
3. Viewing Employee Related Data

Once you have searched for the employee you are looking for in iTrent, click on their name from the panel on the left hand side. You will then be brought to the **summary page**.

From this page you can view information relating to that employee; dashboard, address, position details, absence details etc.

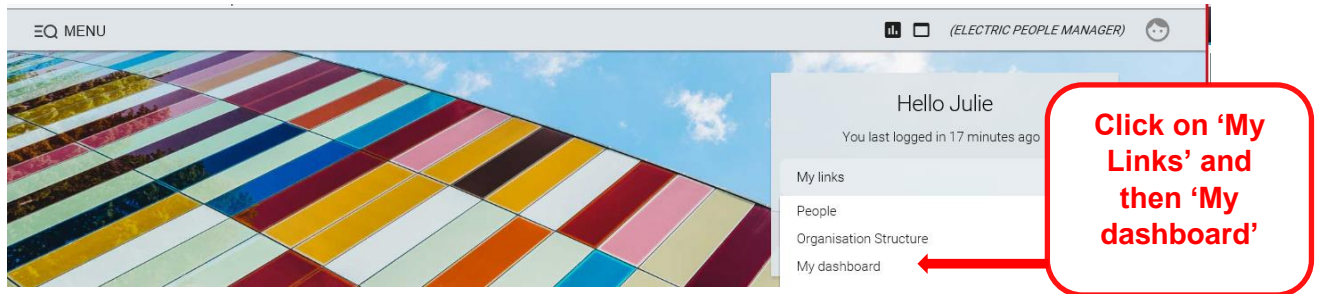


If there is more than one employee with same surname in your team, then more than one name will appear on the panel. To check you are clicking on the right employee you can alter the search to reference number **or** hover over the name and it will give you information on that employee.

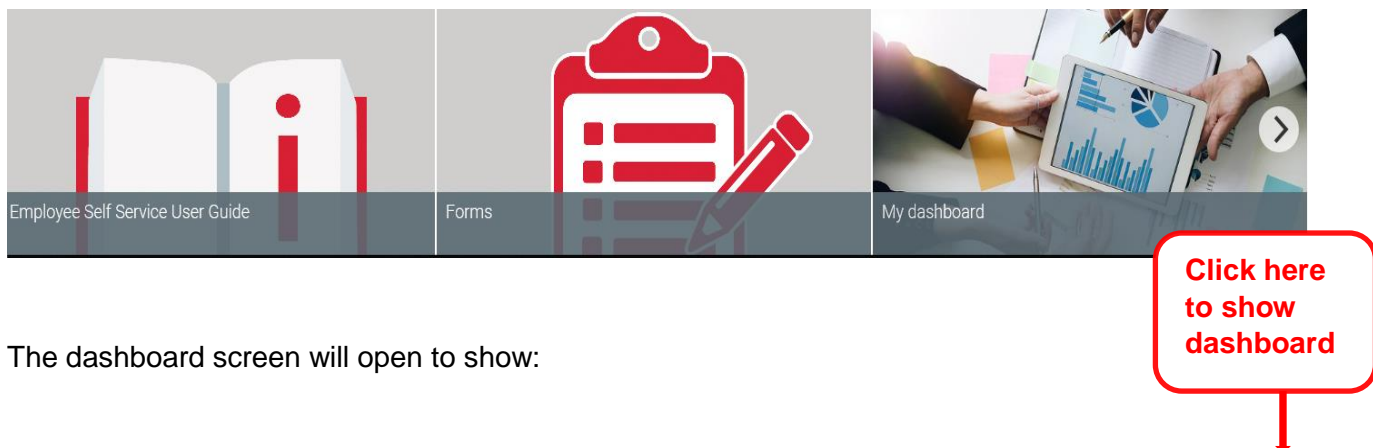


Viewing the Manager Dashboard

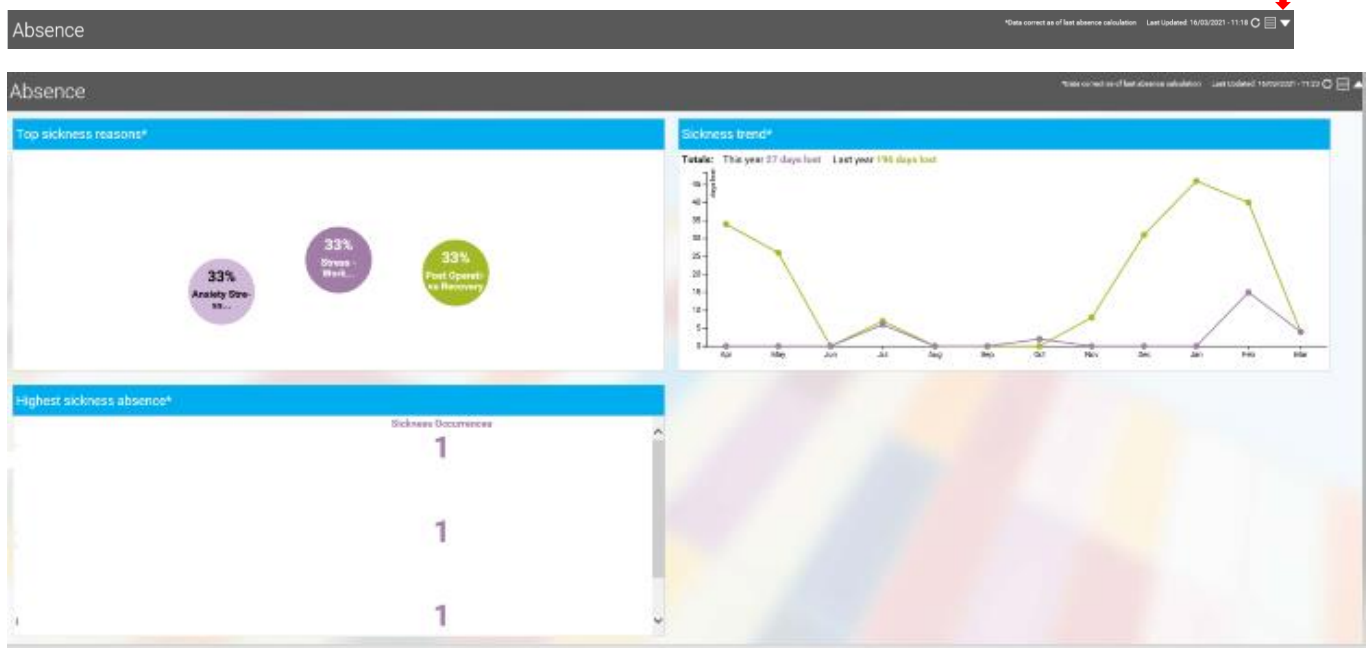
The Manager Dashboard will show you a graphical representation of absence data for your team. The dashboard provides a visual representation of real-time data in the form of various charts.



Another way to access the dashboard is click 'My dashboard' on the carousel along the bottom of the iTrent homepage.

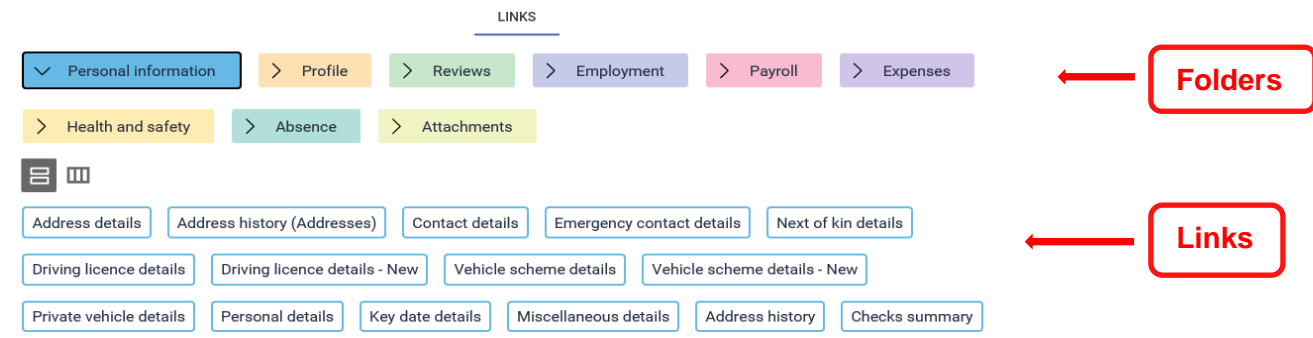


The dashboard screen will open to show:



Folders and Links

iTrent Electric is driven through folders and links meaning when you click on one of the folders it will display links that are related to that folder.



Folders and their related links:

Folder	Links
Personal Information	<ul style="list-style-type: none"> • Address details & history • Contact details • Emergency contact details/next of kin details • Driving licence details • Vehicle scheme details • Private vehicle details • Personal details • Key date details • Miscellaneous details • Checks summary (PVG) • Visas/Work Permit /Passport
Reviews	<ul style="list-style-type: none"> • PDR information
Employment	<ul style="list-style-type: none"> • Position details • Hours and basis • Occupancy details • Work Pattern • Payscale Values • Position history
Health and Safety	<ul style="list-style-type: none"> • H&S details
All Absences	<ul style="list-style-type: none"> • All Absences - View absence calendar, view all absences (past & future) & absence history (can specify a date range to view history for).
Annual Leave, Sickness, Maternity Leave etc are all listed separately.	<ul style="list-style-type: none"> • Annual leave/Annual leave entitlement • Maternity/Paternity/Adoption leave • Sickness absence • Permissible Absence (Other)

4. Recording Absence

4.1 Viewing absences

To view all absence information for an employee you follow the same process as **viewing employee data**.

1. Search for the employee
2. Click on the **absence** folder which will bring up **all absences**
3. You can then select the type of absence you are looking to view or amend.

4.2 Absence calendar

Clicking on the **absence calendar** link will allow you to view all the employees' absences on a calendar view.

If you hover over the box with an absence logged it will display more information relating to that absence

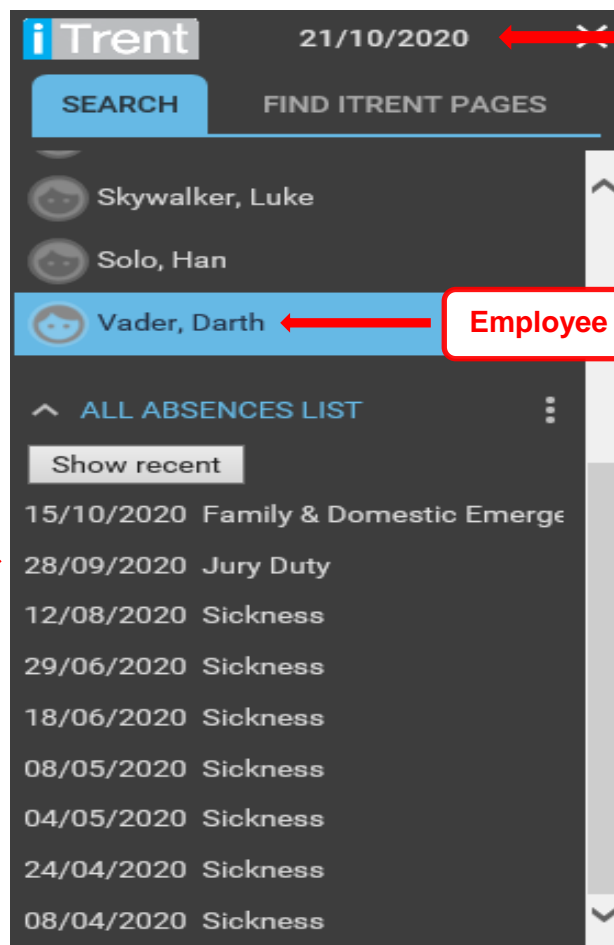
The screenshot shows the 'Absence calendar' interface. At the top, there is a header bar with 'Absence calendar' and a 'MENU' dropdown. Below this, a 'Position' dropdown is set to 'Personal Development Advisor (08/1)'. A date range selector shows '01 Jan - 31 Dec 2020'. The main area is a calendar grid for 2020, with months from January to November visible. A tooltip is displayed over a date (28/09/2020), showing the following details:

- Name: Mr Darth Vader
- Position(s): Personal Development Advisor
- Personal reference: TR1000005
- Payroll reference(s):
- Day: Monday
- Date: 28/09/2020
- Type: Jury Duty
- Period: 28/09/2020 - 28/09/2020
- Position: Personal Development Advisor (TR0005A)
- Occupancy: 08/01/2015 -
- Reporting: blank - Personal Development
- Working pattern: 35hrs (7) M-F (7 Hrs)
- Working Pattern Start Date: 08/01/2015
- Position: Personal Development Advisor (TR0005A)
- Occupancy: 08/01/2015 -
- Reporting: blank - Personal Development

Red callout boxes with arrows point to specific features:

- You can alter the dates using this dropbox.** (Points to the date range selector)
- Employee details.** (Points to the Name, Position, and Personal reference fields in the tooltip)
- Absence type.** (Points to the 'Type: Jury Duty' field in the tooltip)
- Absence dates.** (Points to the date range in the tooltip)

If you click on the link **absence details** it brings up all the absences for that employee in the left hand side panel.



The effective date you are searching from.

Employee you are viewing.

List of all absence dates and types.

Use the scroll to move up and down the list.

To view more details about a specific absence, click on the absence from the list of the left hand side panel. This will show you; length of the absence, the absence start and end dates and the reason for the absence.

Sickness absence details Mr Darth Vader
MENU

Sickness period

Sickness period
More than one day

Absence start

Absence start date
29/06/2020

Absence start type
Full day

Absence end

Absence end date
03/07/2020

Absence end type
Full day

Expected end date

Absence

Absence type
Sickness

Absence reason
<None>

Hide absence reason
☐

Position
Personal Development Advisor (Current)

4.3 Annual Leave

To view an employee's annual leave click on the annual leave folder. This will bring up the links related to annual leave and annual leave dates for that employee on the left hand side panel.

HOLIDAY ABSENCE LIST
Show all
Type
All holidays
29/12/2020
16/11/2020
29/05/2020
14/04/2020
20/03/2020
14/02/2020
31/01/2020
24/01/2020
17/01/2020

Reviews
Health and safety
All Absences
Annual Leave
Paternity Leave
Adoption Leave
Shared Maternity Leave

Absence calendar (Holiday)
Holiday absence details
Holiday absence details - New

Annual leave dates will be shown here.

Links related to annual leave.

Your **to do list** on the homepage will alert you that you have annual leave requests pending and from there you can accept or reject the request. You can also enter annual leave manually.

To input a new holiday manually select **holiday absence details - new**. You will then be brought to this page where you can; edit the length of the holiday, amend start and end dates.

The screenshot shows a web form titled "Holiday absence details New" with a "MENU" dropdown and icons for refresh, print, and attachment. The form is divided into several sections:

- Holiday period**: Includes a dropdown menu currently set to "More than one day". A red callout box with the text "You can alter the length of the holiday." has an arrow pointing to this dropdown.
- Holiday start**: Includes a "Holiday start date" field with a calendar icon and a "Holiday start type" dropdown set to "Full day". A red callout box with the text "Enter the start date." has an arrow pointing to the date field.
- Holiday end**: Includes a "Holiday end date" field with a calendar icon and a "Holiday end type" dropdown set to "Full day". A red callout box with the text "Enter the end date." has an arrow pointing to the date field.
- Absence**: Includes an "Absence type" dropdown set to "Personal Holiday" and an "Authorisation" field set to "Not applicable".
- + Holiday balances**: A section header at the bottom of the form.

At the bottom of the form is a green "SAVE" button. A red callout box with the text "Click save" has an arrow pointing to this button.

4.4 Amending and cancelling annual leave

To cancel / delete annual leave click on either the **absence details** link or the **holiday absence link**. This will then bring up any annual leave dates on the left hand side of the screen, you can then select any of the dates you wish to cancel.

Once you click on the date of the annual leave you want to cancel you will be taken to this screen, where you can delete the entry. Click on **delete** and if you wish to enter a new annual leave date click on **new** which will take you to the **holiday absence details - new** screen and follow the process detailed in the section above.

To amend the dates of the annual leave follow this same process. If you are changing the dates of the holiday by only a couple of days you might find it easier to amend the annual leave rather than delete and create a new entry. From this screen you can edit the length of the annual leave, start and end dates.

Holiday absence details Mr Darth Vader ▾ MENU

Holiday period

Holiday period • More than one day ▾

Holiday start

Holiday start date • 29/10/2020 📅

Holiday start type • Full day ▾

Holiday end

Holiday end date • 30/10/2020 📅

Holiday end type • Full day ▾

Absence

Absence type • Personal Holiday ▾

Authorisation • Not applicable

Position • Personal Development Advisor (Current)

+ Holiday balances

SAVE **DELETE** **NEW**

To amend the period of leave e.g. part day or full day.

Click here to amend the start date.

Click here to amend the end date.

Ensure you save after any amendments.

If you want to cancel the annual leave entry.

To create a new annual leave entry. You will be taken to a new screen.

4.5 Sickness Absence

To enter a sickness absence for an employee click on the **sickness absence - new** link. All fields with a blue dot must be completed for the entry to save.

If an employee has more than one role you should ensure you update for **all positions**


The screenshot shows the 'Sickness absence details' form. At the top, there is a header bar with the title 'Sickness absence details New' and a 'MENU' button. Below the header, the form is divided into sections: 'Sickness period', 'Absence start', 'Absence end', and 'Absence'. The 'Sickness period' section has a dropdown menu set to 'More than one day'. The 'Absence start' section has fields for 'Absence start date' (with a calendar icon), 'Absence start type' (set to 'Full day'), and 'Absence end' (with a calendar icon). The 'Absence end' section has fields for 'Absence end date' (with a calendar icon), 'Absence end type' (set to 'Full day'), and 'Expected end date' (with a calendar icon). The 'Absence' section has fields for 'Absence type' (with a dropdown menu), 'Absence reason' (with a dropdown menu set to '<None>'), and 'Set as default' (checkbox). There is also a 'Hide absence reason' checkbox. A green 'SAVE' button is at the bottom. Red callout boxes with arrows point to specific fields: 'Enter the start date of the absence.' points to the 'Absence start date' field; 'This should not be entered until the employee returns to' points to the 'Absence end date' field; 'The absence type is sickness.' points to the 'Absence type' dropdown; 'Choose the absence reason from the dropdown menu.' points to the 'Absence reason' dropdown; and 'Click save once you have entered the required information.' points to the 'SAVE' button.

Sickness absence details New MENU

Sickness period


Sickness period • More than one day

Absence start


Absence start date •  Enter the start date of the absence.

Absence start type Full day


Absence end


Absence end date  This should not be entered until the employee returns to

Absence end type Full day

Expected end date 

Absence

The absence type is sickness. Absence type •  Set as default ☐

Absence reason • <None>  Choose the absence reason from the dropdown menu.

Hide absence reason ☐

Click save once you have entered the required information. SAVE

Ensure that when an employee returns to work you enter the **absence end date**, this could result in the employee not receiving their salary if not closed off on return. To do this click on the **sickness absence details** link and all the employees sickness absence dates will appear on the left hand-side of the screen. Once you choose the absence you are closing off you will be taken to this page where you should enter the end date of the absence.



Sickness period

Sickness period

Absence start

Absence start date Absence start type

Absence end

Absence end date Absence end type Expected end date

Enter the end date here and click save at the bottom of the screen. This absence will now be closed off.

Absence

Absence type Absence reason Hide absence reason ☐Position

4.6 Certification details

You must update the certification details for all sickness absences. To do this click on the **certification details – new** link. On this screen you can select the type of certification e.g. Fit Notes, and enter the start date, end date and submission date. You must fill out all fields with the blue dot and save when completed.

The screenshot shows the 'Certification details' form for a user named 'Mr Han Solo'. The form has a dark header bar with the title 'Certification details' and a 'MENU' button. Below the header, there are several input fields: 'Certification type' (a dropdown menu), 'Certification reason' (a text field), 'Final certificate' (a checkbox), 'Start date' (a date picker), 'End date' (a date picker), and 'Submission date' (a date picker). At the bottom of the form, there are two buttons: a green 'SAVE' button and a red 'DELETE' button.

Another option to get to the certification details screen is by clicking **menu** once you have saved the sickness absence details.

The screenshot shows the 'Sickness absence details' form for a user named 'Mr Han Solo'. The form has a dark header bar with the title 'Sickness absence details' and a 'MENU' button. A red callout box with the text 'Click on menu and then certification details.' points to the 'MENU' button. Below the header, there are several input fields: 'Sickness period' (a dropdown menu), 'Absence start' (a section header), 'Absence start date' (a date picker), 'Absence start type' (a dropdown menu), 'Absence end' (a section header), 'Absence end date' (a date picker), 'Absence end type' (a dropdown menu), 'Expected end date' (a date picker), 'Absence' (a section header), 'Absence type' (a dropdown menu), 'Absence reason' (a dropdown menu), 'Hide absence reason' (a checkbox), and 'Position' (a text field). At the bottom of the form, there is a 'Training Team Leader (Current)' label.

4.7 Permissible absences

To input any permissible absences click on the **other absence details – new** link. This should be used for absences such as; jury duty, hospital appointments, election work etc. There is a drop down menu where you can select the type of absence.

The screenshot shows a web form titled "Other absence details" with a "New" link and a "MENU" dropdown. The form is divided into several sections: "Absence period" with a dropdown set to "More than one day"; "Absence start" with a date field (marked with a blue dot) and a "Type" dropdown set to "Full day"; "Absence end" with a date field and a "Type" dropdown set to "Full day"; and "Expected end date" with a date field. Below these is the "Absence" section, which includes an "Absence type" dropdown (marked with a blue dot), an "Absence reason" dropdown set to "<None>", and a "Hide absence reason" checkbox. At the bottom is a green "SAVE" button. Annotations with red boxes and arrows point to the upload icon, the "Absence type" dropdown, the "SAVE" button, and the top right of the form.

Other absence details New MENU

Absence period

Absence period • More than one day

Absence start

Date •

Type Full day

Absence end

Date

Type Full day

Expected end date

Absence

Absence type •

Absence reason <None>

Hide absence reason ☐

SAVE

Click here to upload any supporting documents.

Use the drop down menu to select the type of absence.

Save once completed all fields with the blue dots.

5. Recording PDRS

To view any review related information click on the link **review** and a list of all PDR information will appear on the panel on the left hand side of the screen.

To input new PDR information click on the link **review details new**. This screen will allow you to enter details relating to the employees PDR: if an employee has more than one role make sure you select which role this review is for.

You can upload any supporting PDR documents on this page. These are able to be viewed at any point and will appear on the panel on the left hand side of the page when you click on the review links.

The screenshot shows a web form titled "Review details New" with a "MENU" dropdown and icons for refresh, print, and upload. The form fields are as follows:

Field	Value
Job title	Training Advisor
Review type	2020/21 End of Year PDR
Date occurred	19/10/2020
Overall rating	Final - Objectives met
Next review date	01/02/2021

At the bottom of the form is a green "SAVE" button. Two red callout boxes provide instructions:

- A callout box pointing to the upload icon in the top right corner contains the text: "Click here to upload any supporting documents."
- A callout box pointing to the "SAVE" button contains the text: "Click save once you have completed."

6. Useful information

When viewing an employee's information if you click on the name at the top of the screen it will take you back to the summary page without needing to search for that employee again.

Mr Han Solo

Hours and basis (as of 23/10/2020) Training Team Leader MENU

Contractual Hours	35.00	⬇
FTE hours	35.00	⬇
Post budgeted hours		⬇
Annual weeks worked	52	⬇
Employment is term-time only	<input type="checkbox"/>	
Category		⬇
Basis		⬇
Type		⬇
Change reason		⬇

FTE details

Override FTE calculation	No override	⬇
FTE value (rounded to 5 DP)	0.99731	

Summary page

Mr Han Solo

Personal
Born on 02/03/1954
TR1000002 (Personal ref.)

Employment
Training Team Leader

LINKS

[Personal information](#) [Profile](#) [Reviews](#) [Employment](#) [Payroll](#) [Expenses](#)

[Health and safety](#) [Absence](#) [Attachments](#)

Element details

Shift patterns

Inheritance chart (Patterns)

Inheritance chart (Elements)

Pattern details (Positions)

History (Position patterns)

History (Elements)

Pattern override (Positions) - New

Position details

Blue dots

If you are inputting information into a screen you **must** complete each field which has blue dots as these are mandatory prior to saving the changes.

Sickness absence details Mr Han Solo

MENU

Sickness period

Sickness period • More than one day

Absence start

Absence start date • 06/07/2020

Absence start type Full day

Absence end

Absence end date 10/07/2020

Absence end type Full day

Expected end date

Absence

Absence type • Sickness

Absence reason • Dental & Oral Problems: Tooth Extra

Hide absence reason ☐

Position Training Team Leader (Current)

Tasks Redirections

Your tasks should be redirected to another manager when you are on annual leave by completing the My task redirection details – NEW.

LINKS

Redirection of Tasks

My task redirection details

My task redirection details - New

