# iTrent Electric
# Manager Self Service
# User Guide

Employee Services
March 2021

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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.

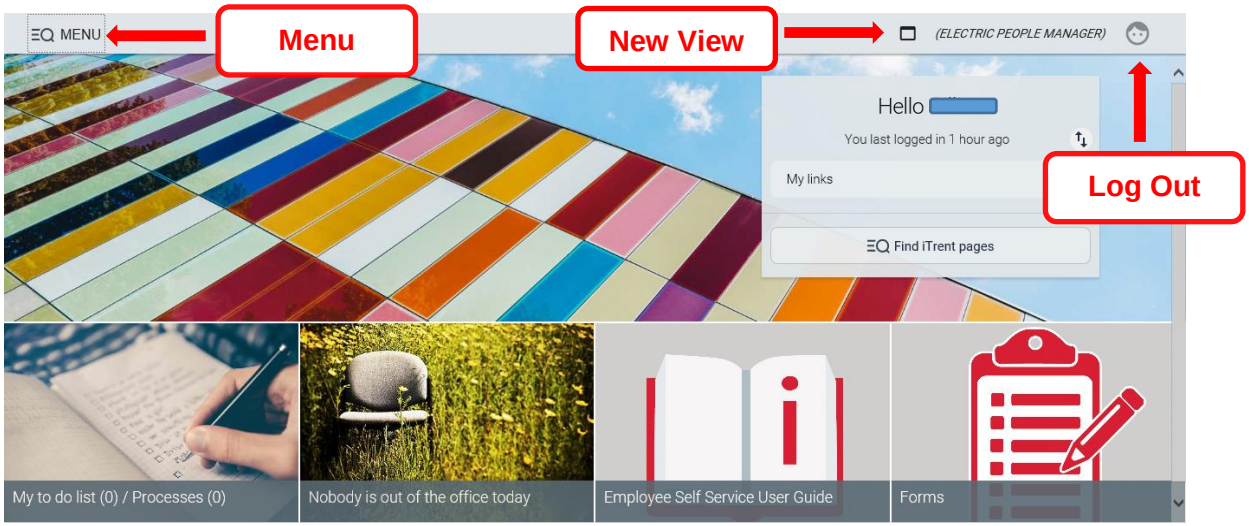
Your username and password is the same as the network username and password you use to log into your PC or Laptop.

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.



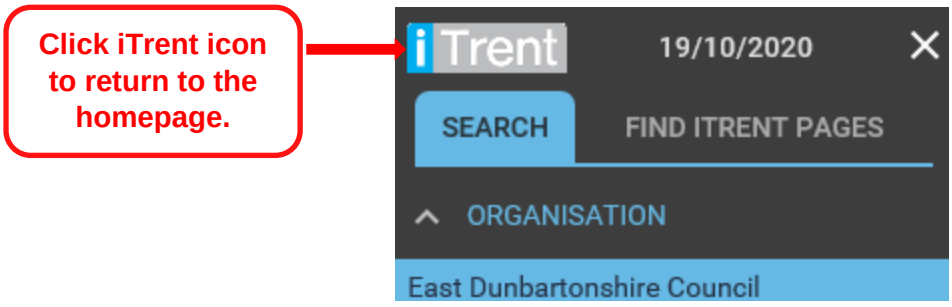

### The Homepage Explained:

**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.*

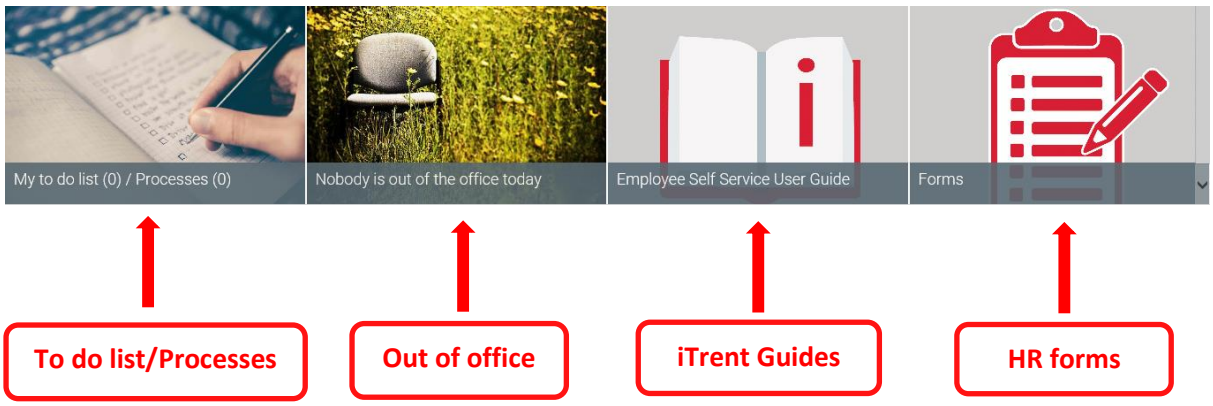
*Find iTrent Pages – this gives you a list of your most visited pages.*

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).

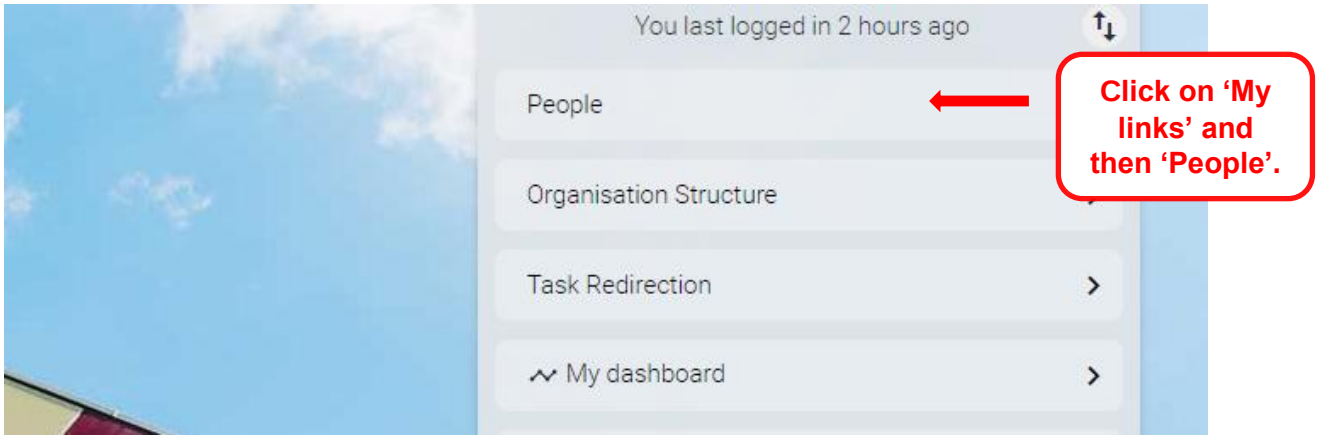
**Employee User Guide:** link to the user guide for MSS (Manager Self Service, and also ESS (Employee Self Service).

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

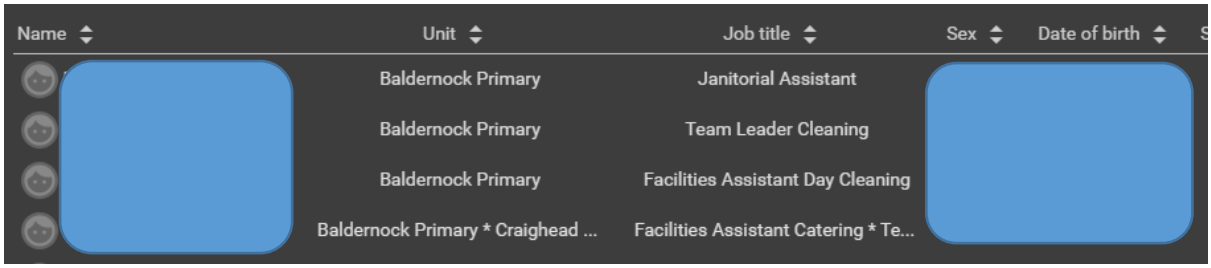
**Dashboard:** View of Absence details for your reportees.

### Searching for an employee

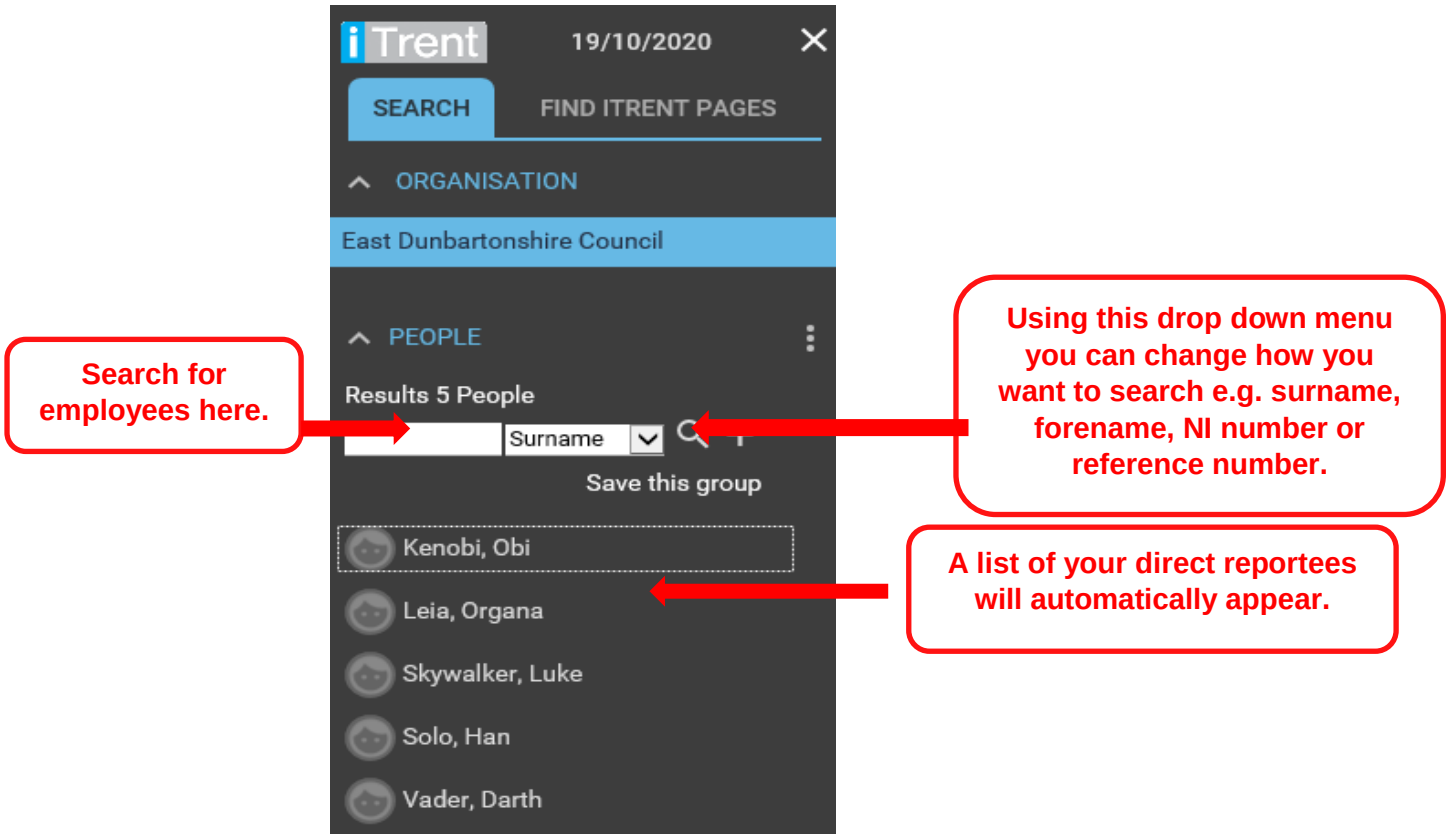
To search for an employee on iTrent Electric click on My Links and select People



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.



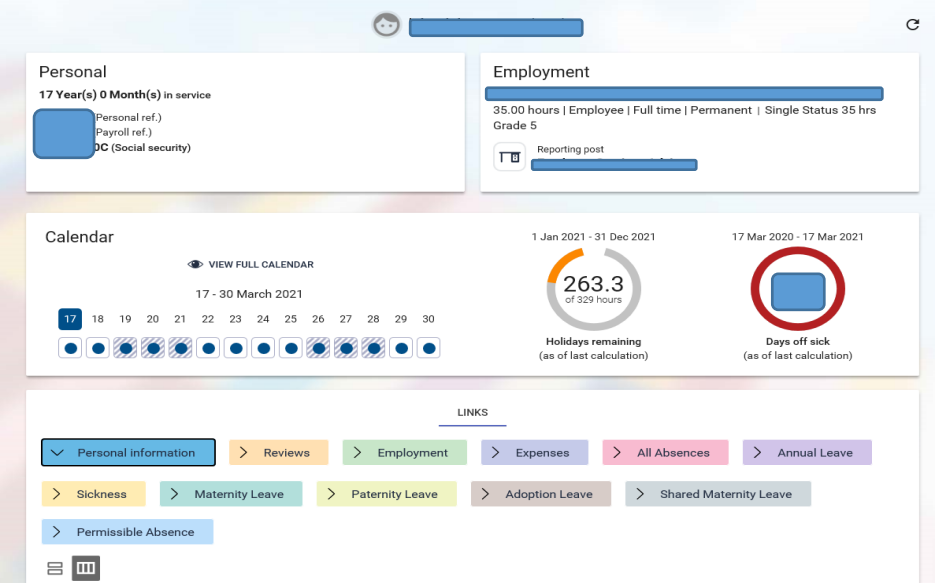

You can also search for other employees in your Team who are not direct reportees using the name search.



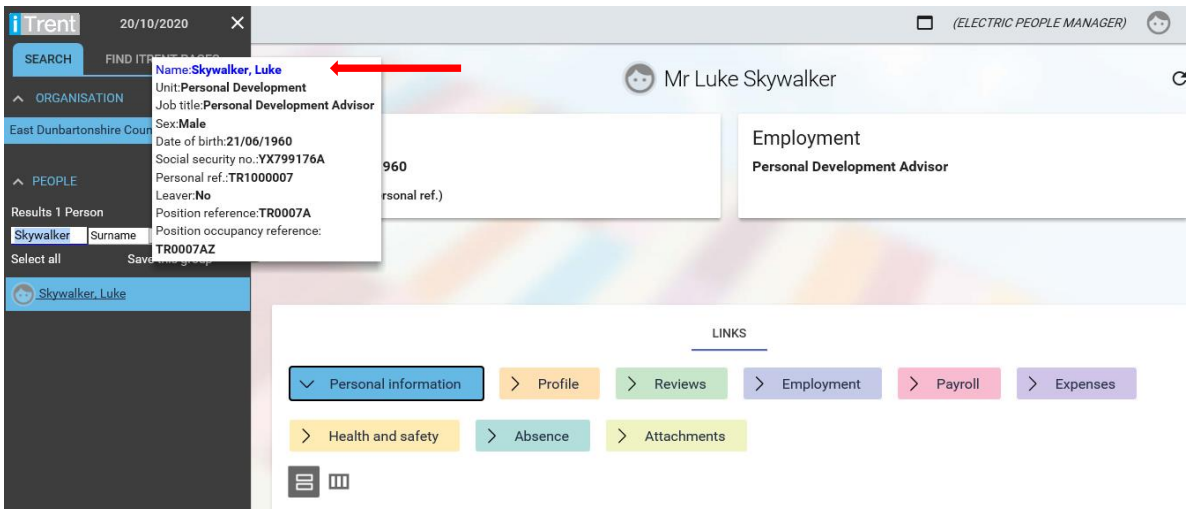
## 3. Viewing Employee Related Data

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.

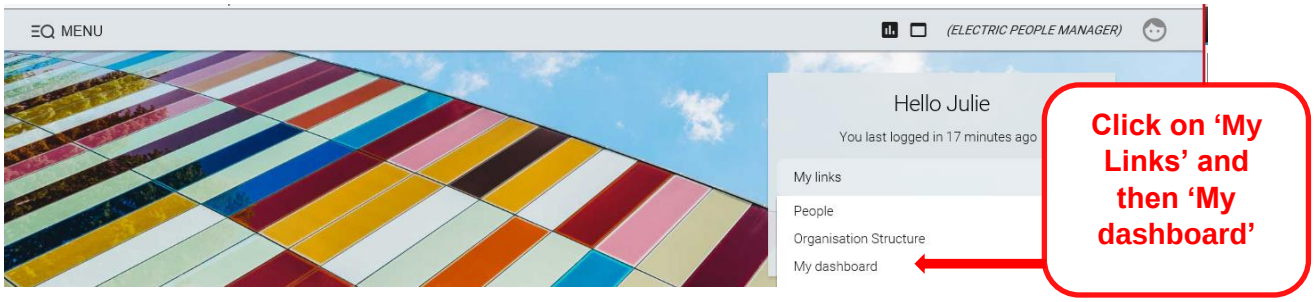



If there is more than one employee with same surname in your team, then more than one name will appear on the panel. To check you are clicking on the right employee you can alter the search to reference number **or** hover over the name and it will give you information on that employee.



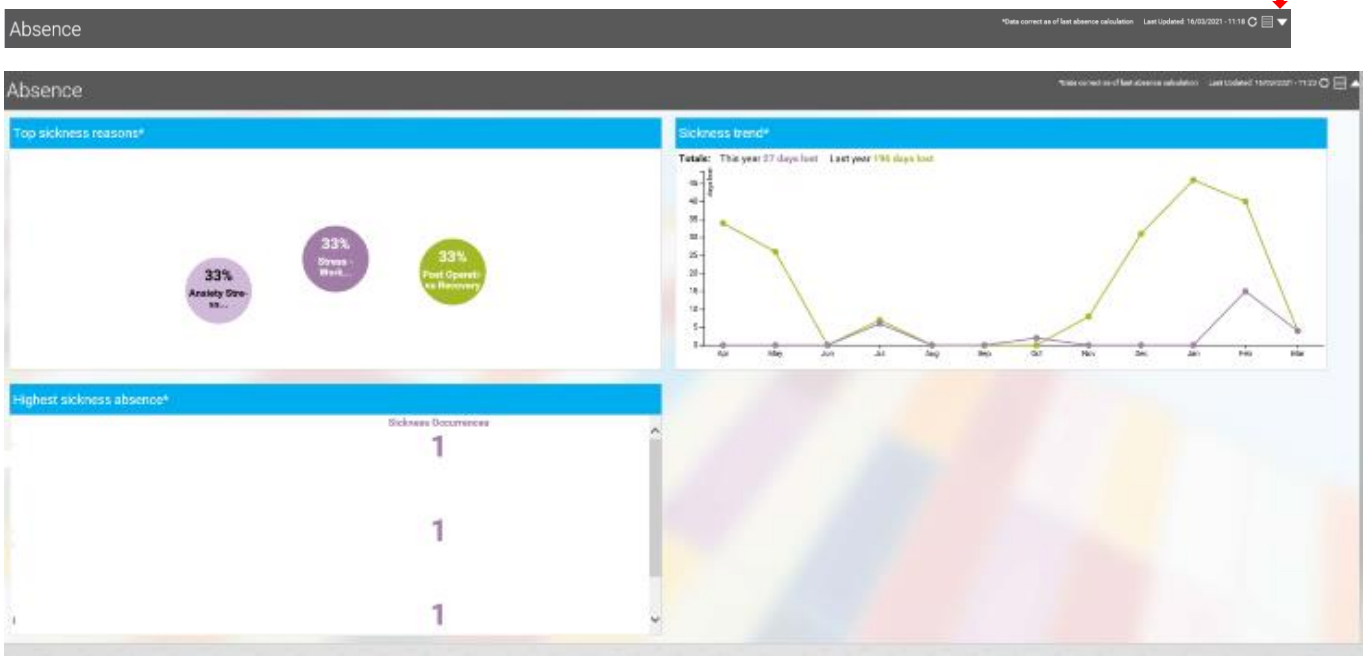
## Viewing the Manager Dashboard

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.



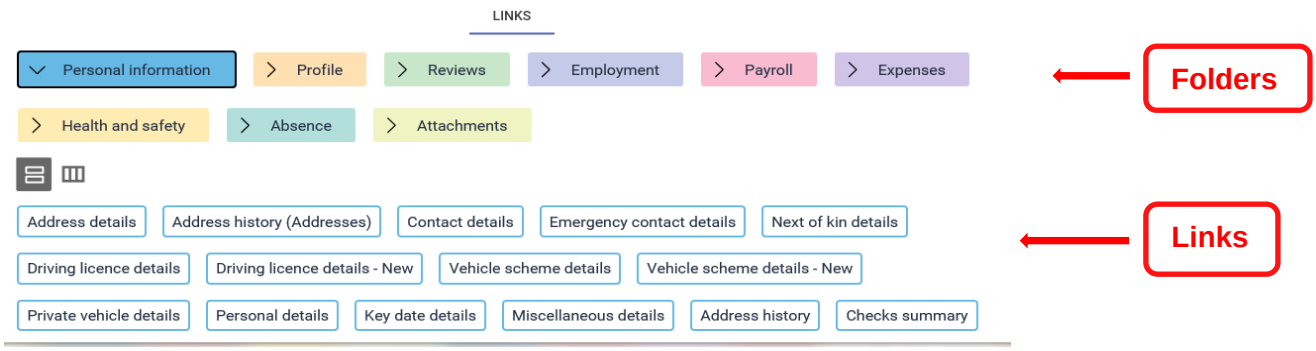

Another way to access the dashboard is click 'My dashboard' on the carousel along the bottom of the iTrent homepage.

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** | • Address details & history<br>• Contact details<br>• Emergency contact details/next of kin details<br>• Driving licence details<br>• Vehicle scheme details<br>• Private vehicle details<br>• Personal details<br>• Key date details<br>• Miscellaneous details<br>• Checks summary (PVG)<br>• Visas/Work Permit /Passport |
| **Reviews** | • PDR information |
| **Employment** | • Position details<br>• Hours and basis<br>• Occupancy details<br>• Work Pattern<br>• Payscale Values<br>• Position history |
| **Health and Safety** | • H&S details |
| **All Absences** | • 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.** | • Annual leave/Annual leave entitlement<br>• Maternity/Paternity/Adoption leave<br>• Sickness absence<br>• Permissible Absence (Other) |

# 4. Recording Absence

## 4.1 Viewing absences

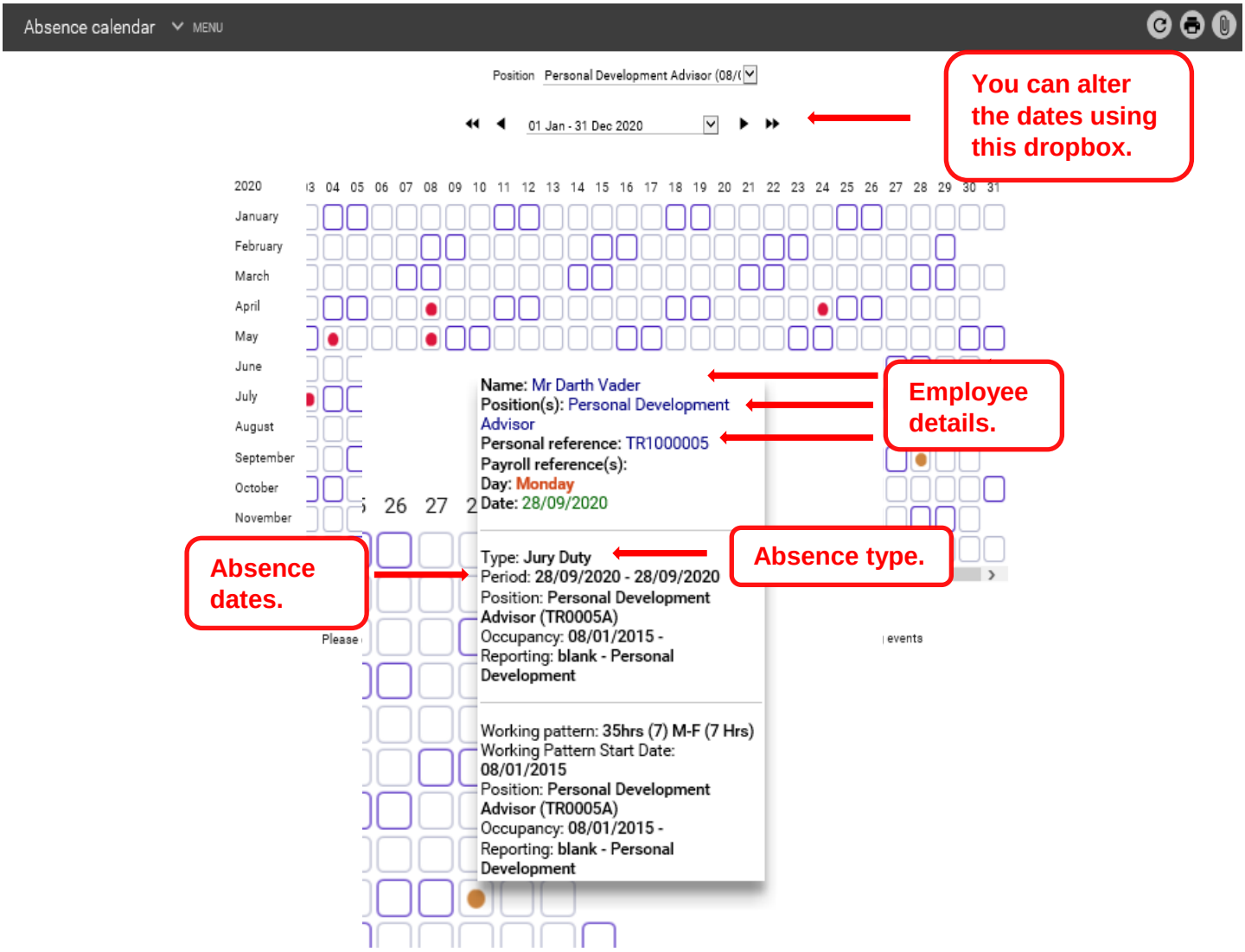
To view all absence information for an employee you follow the same process as **viewing employee data.**

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.

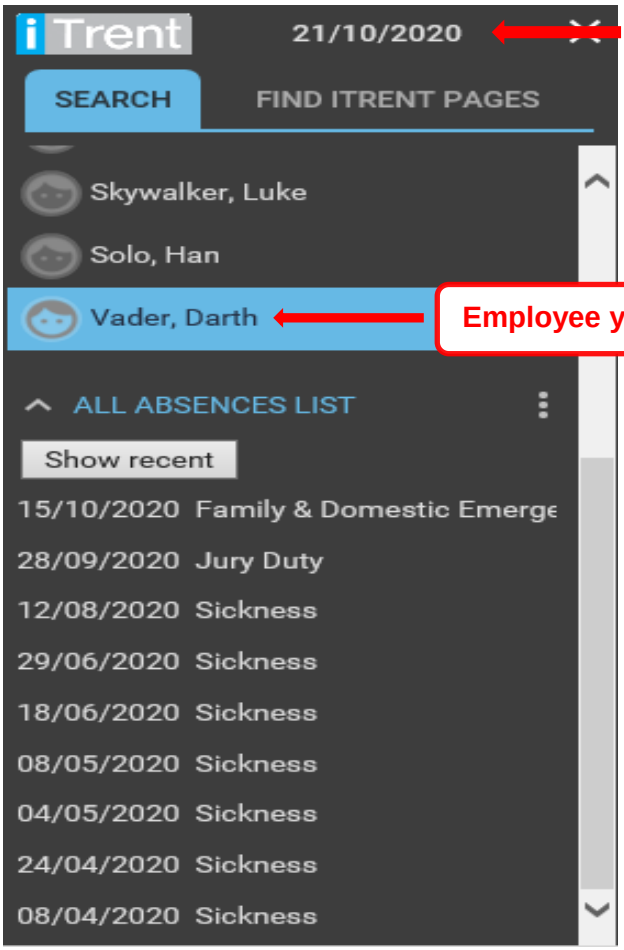
## 4.2 Absence calendar

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



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



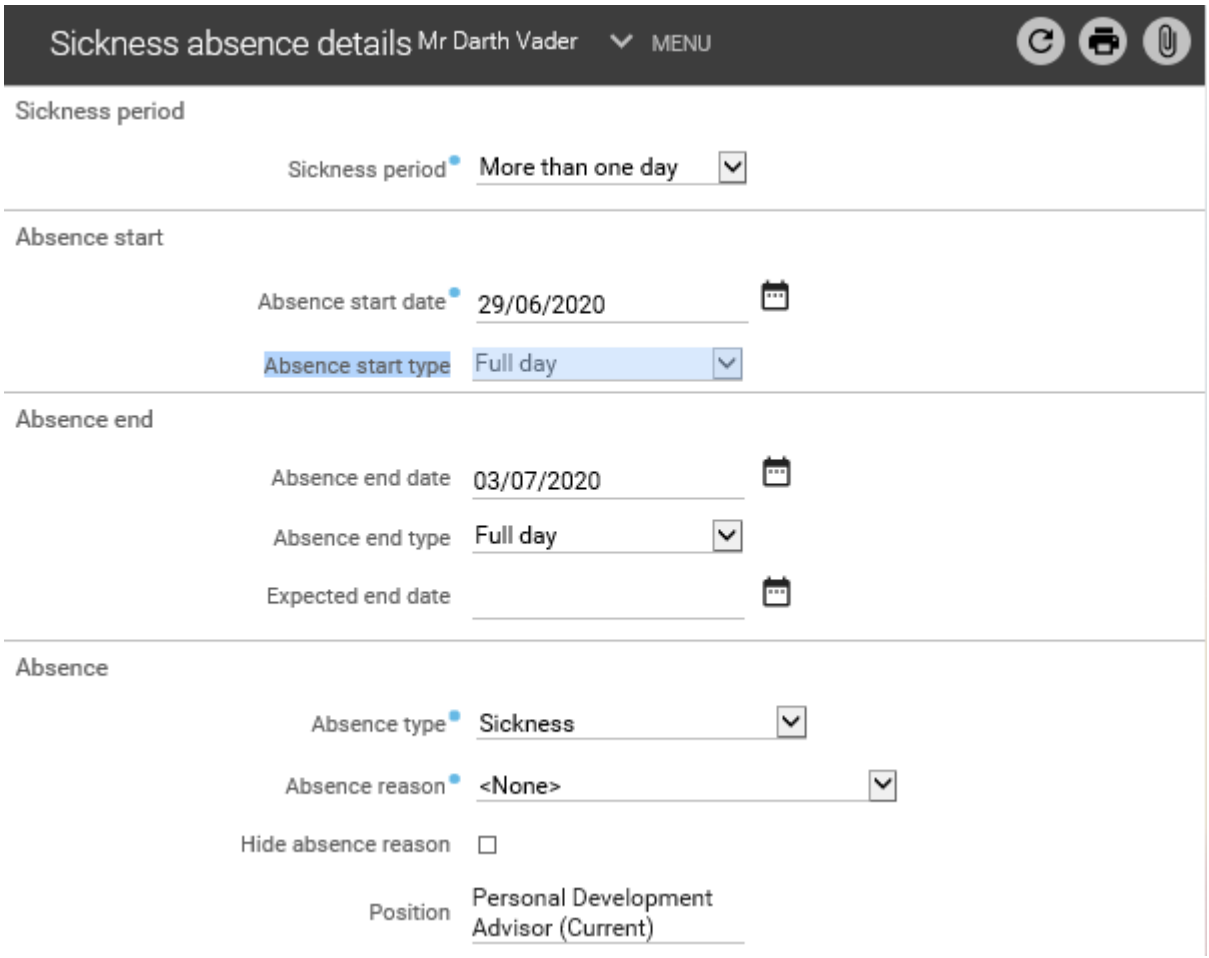

**The effective date you are searching from.**

**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.

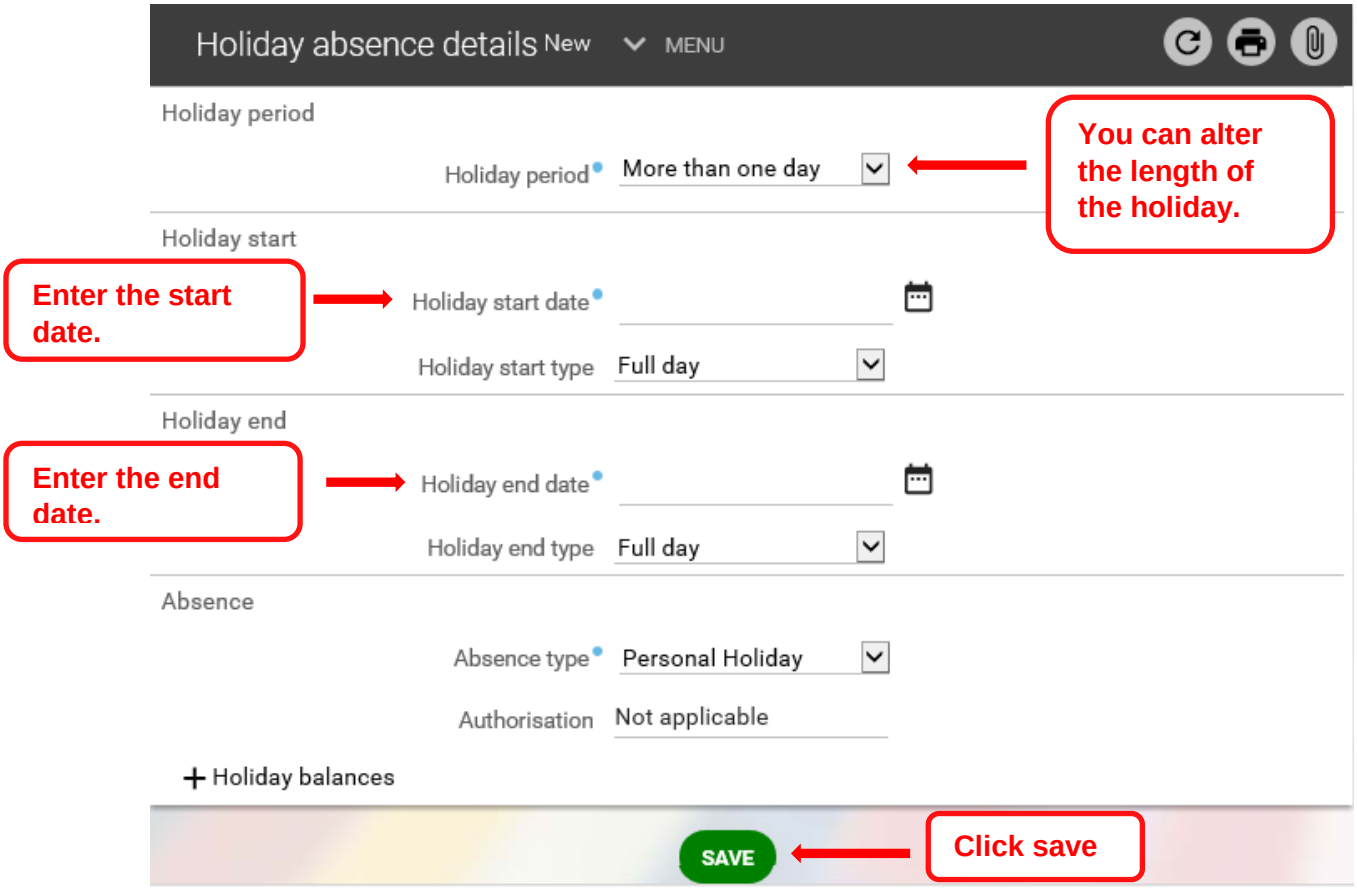



### 4.3 Annual Leave

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.

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.

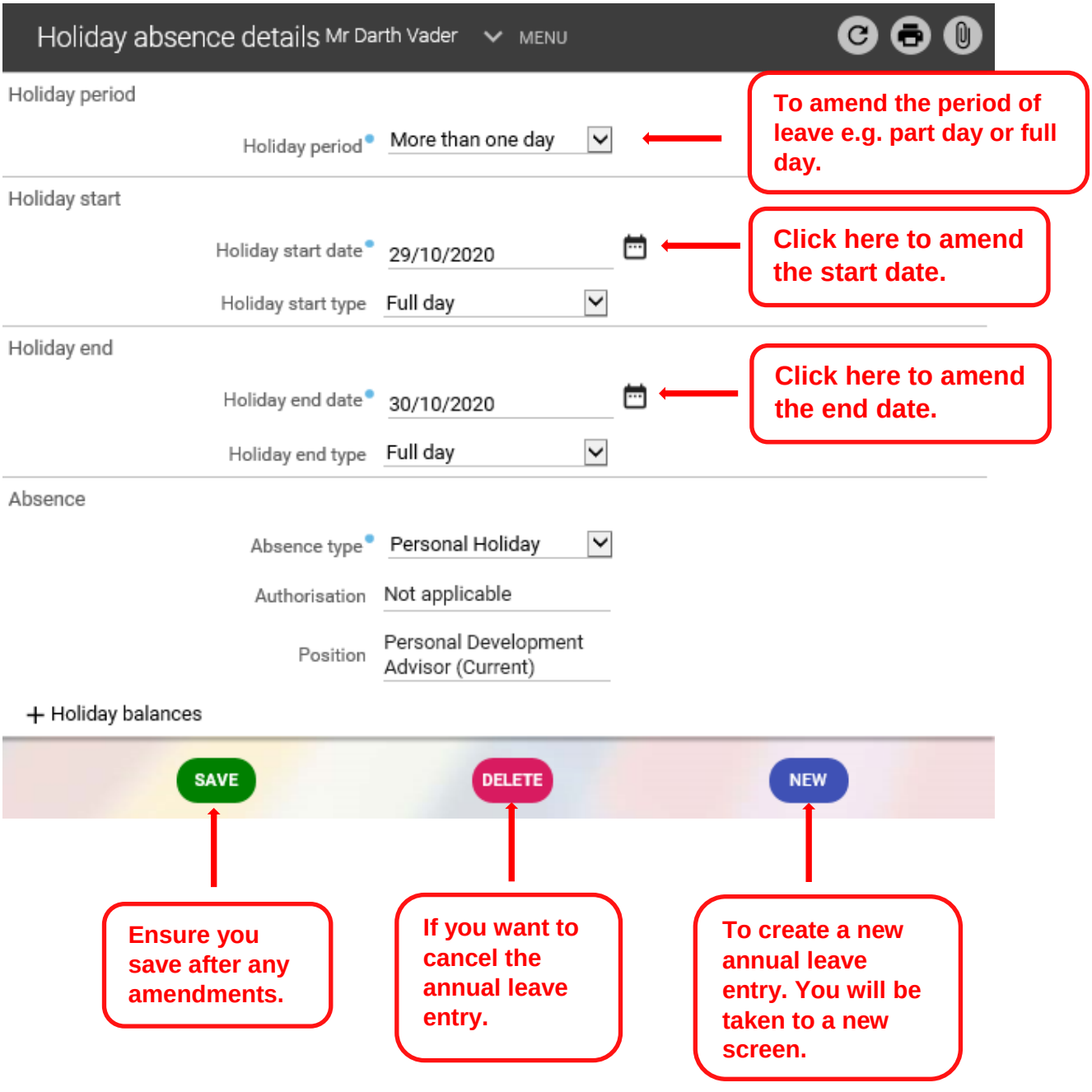


### 4.4 Amending and cancelling annual leave

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.

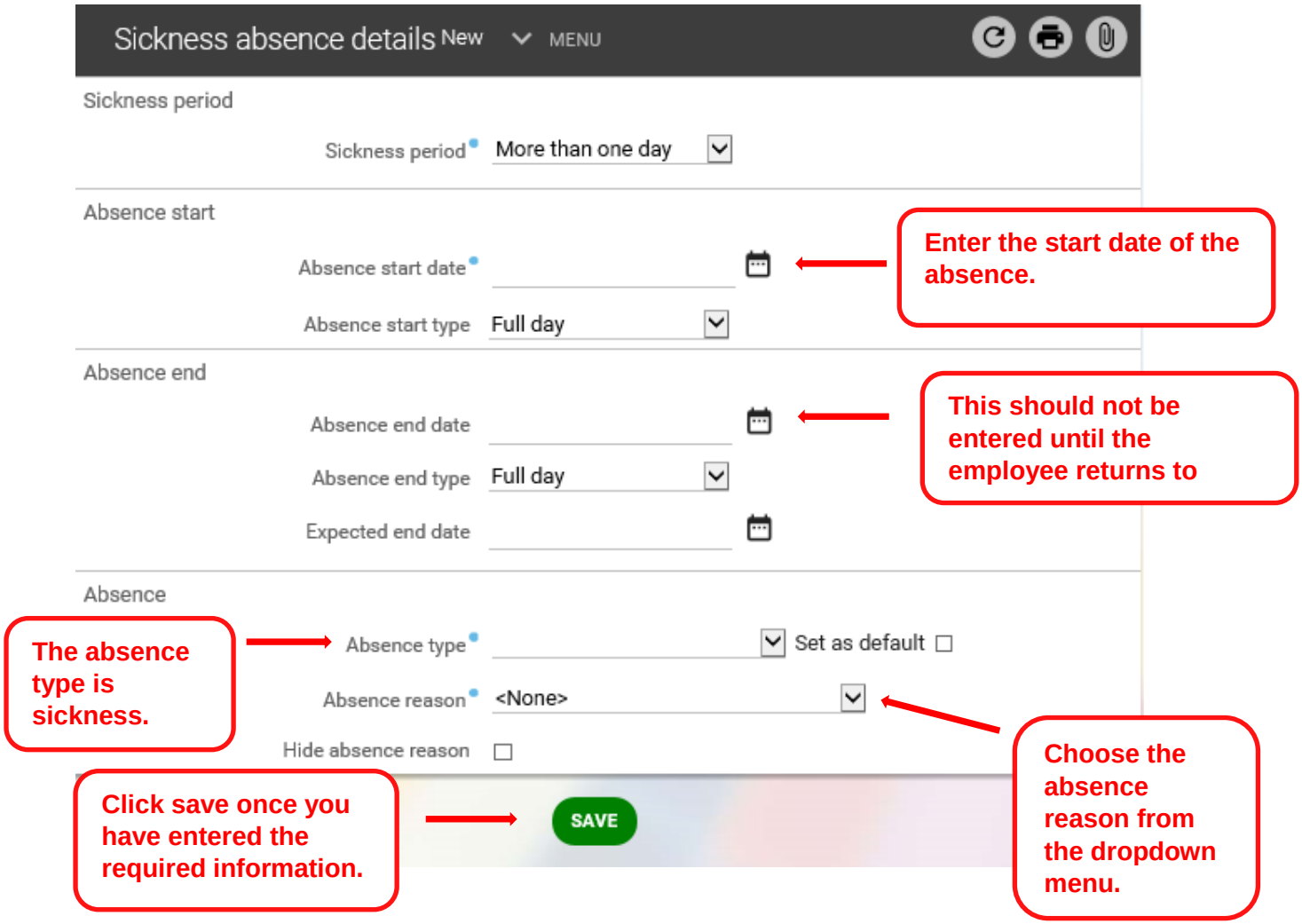
To amend the dates of the annual leave follow this same process. If you are changing the dates of the holiday by only a couple of days you might find it easier to amend the annual leave rather than delete and create a new entry. From this screen you can edit the length of the annual leave, start and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



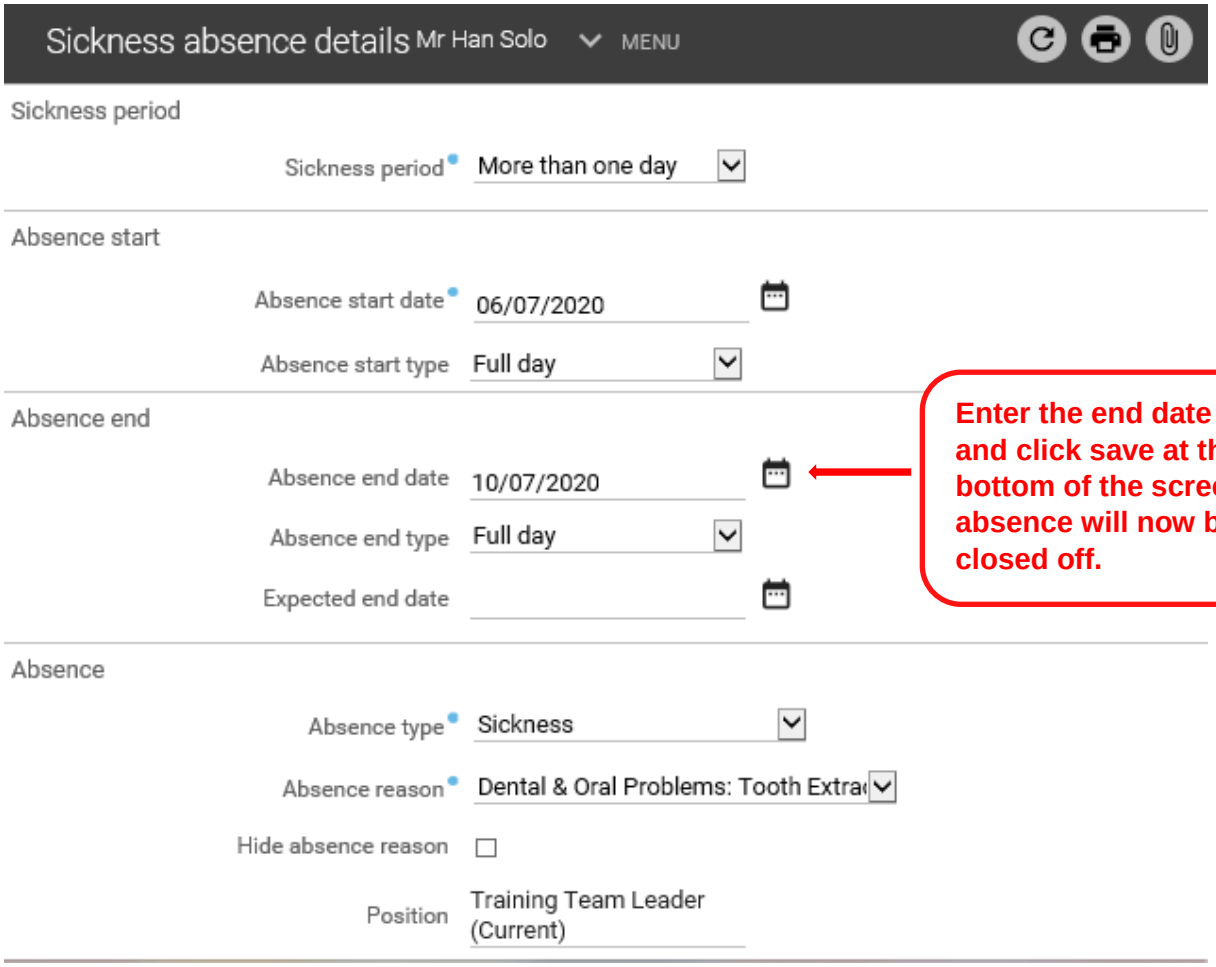
### 4.5 Sickness Absence

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**

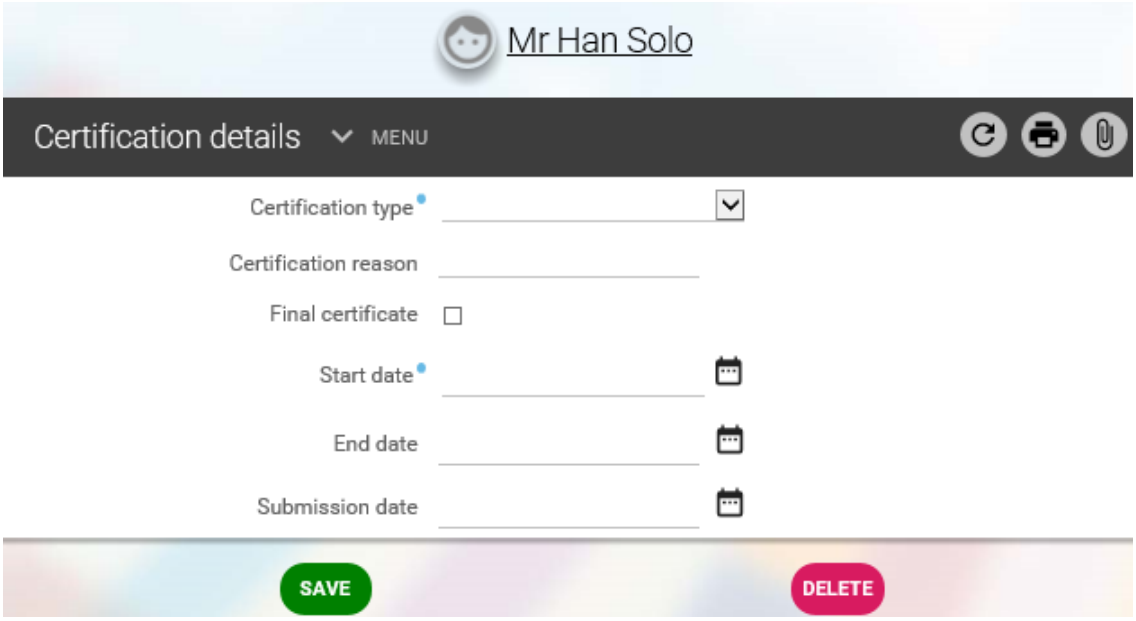



Ensure that when an employee returns to work you enter the **absence end date**, this could result in the employee not receiving their salary if not closed off on return. To do this click on the **sickness absence details** link and all the employees sickness absence dates will appear on the left hand-side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

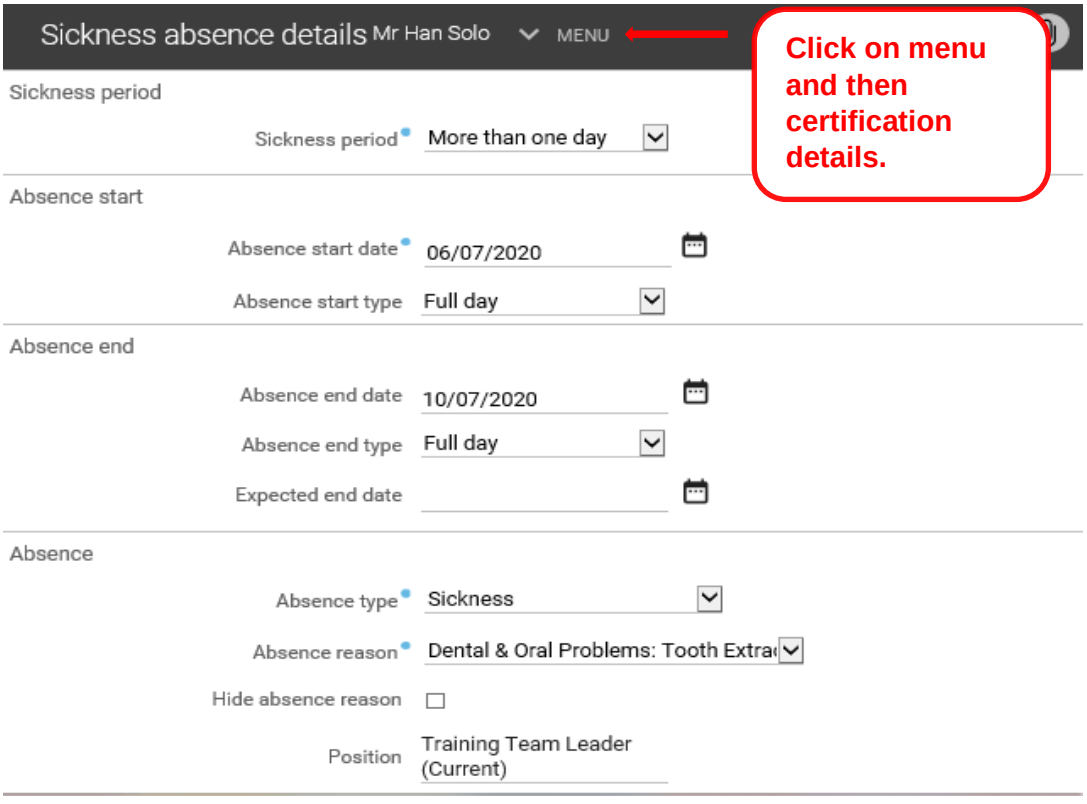

Sickness absence details Mr Han Solo
MENU
Sickness period
Sickness period
More than one day
Absence start
Absence start date
06/07/2020
Absence start type
Full day
Absence end
Absence end date
10/07/2020
Absence end type
Full day
Expected end date
Absence
Absence type
Sickness
Absence reason
Dental & Oral Problems: Tooth Extra
Hide absence reason
Position
Training Team Leader (Current)
Enter the end date here and click save at the bottom of the screen. This absence will now be closed off.

### 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.

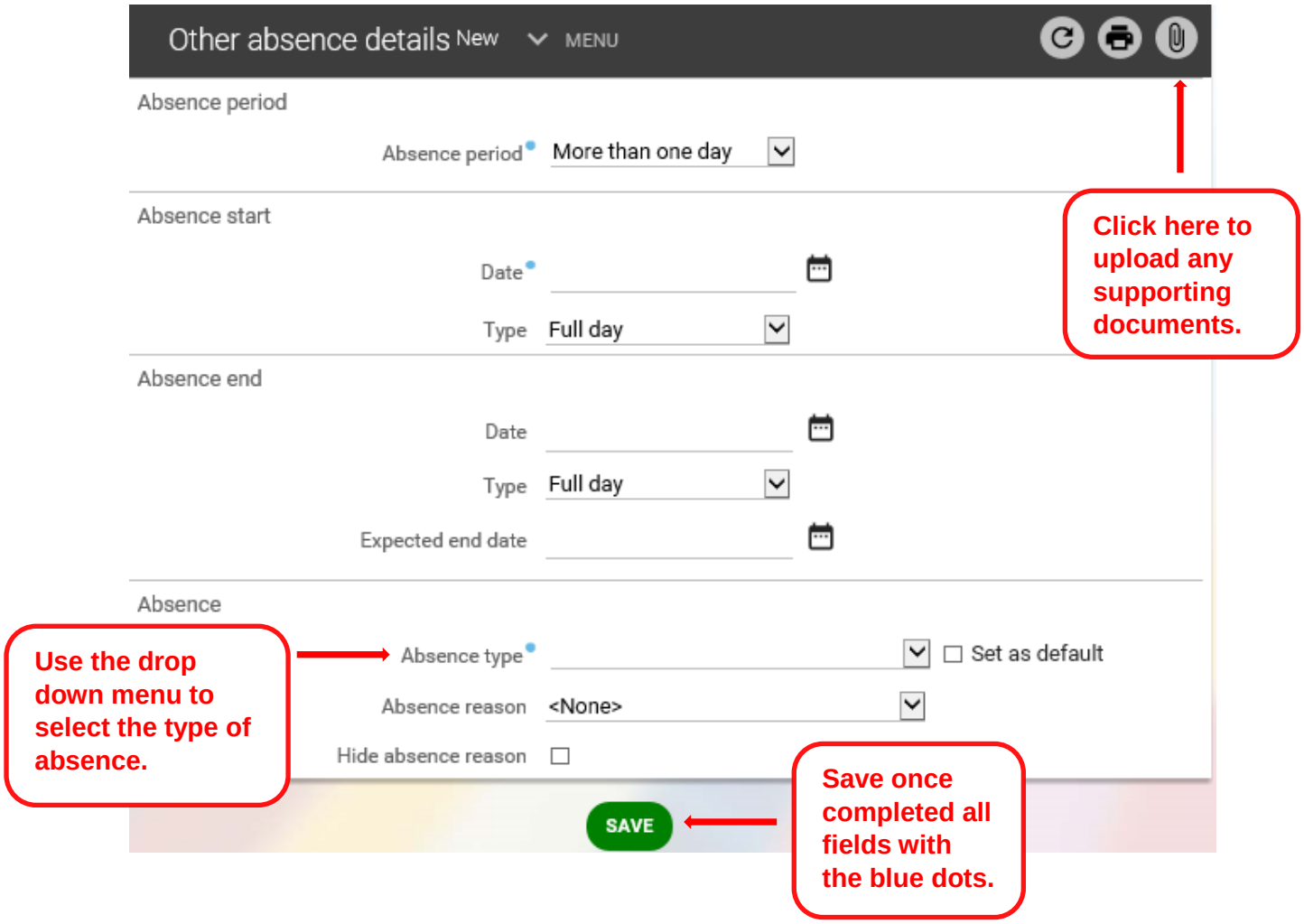



Another option to get to the certification details screen is by clicking **menu** once you have saved the sickness absence details.



### 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.

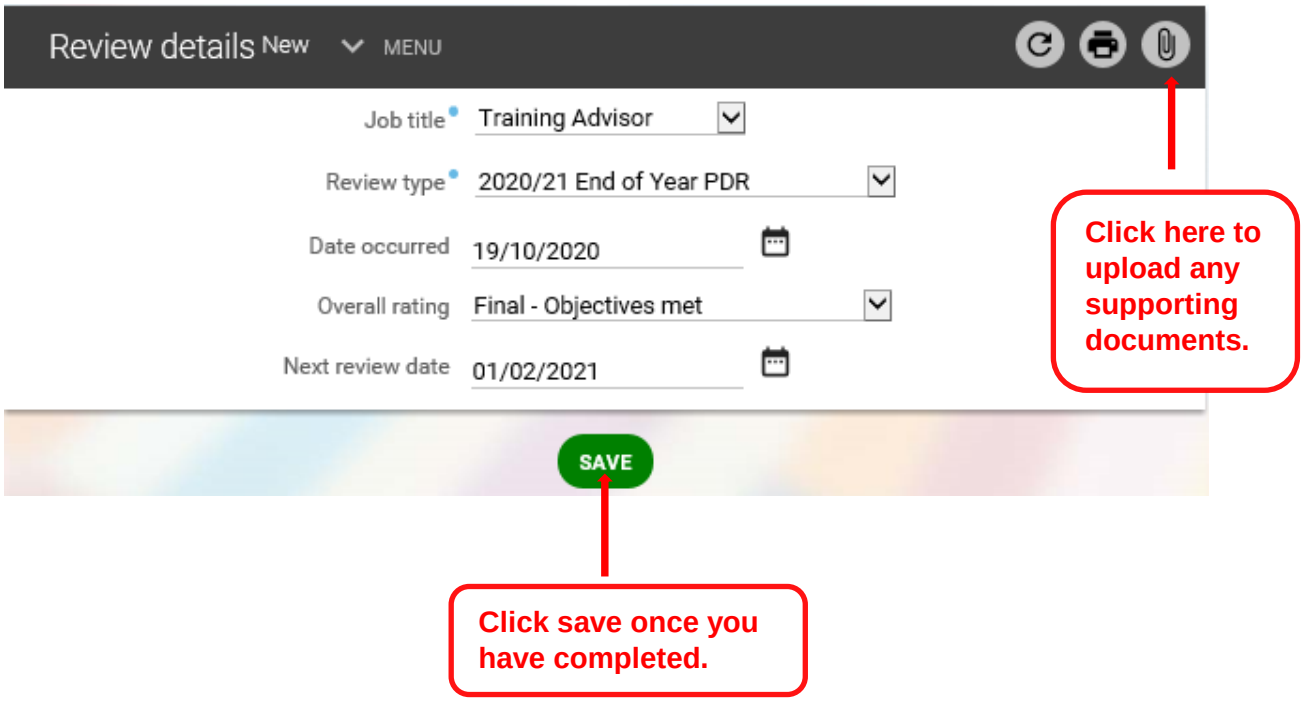


## 5. Recording PDRS

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.

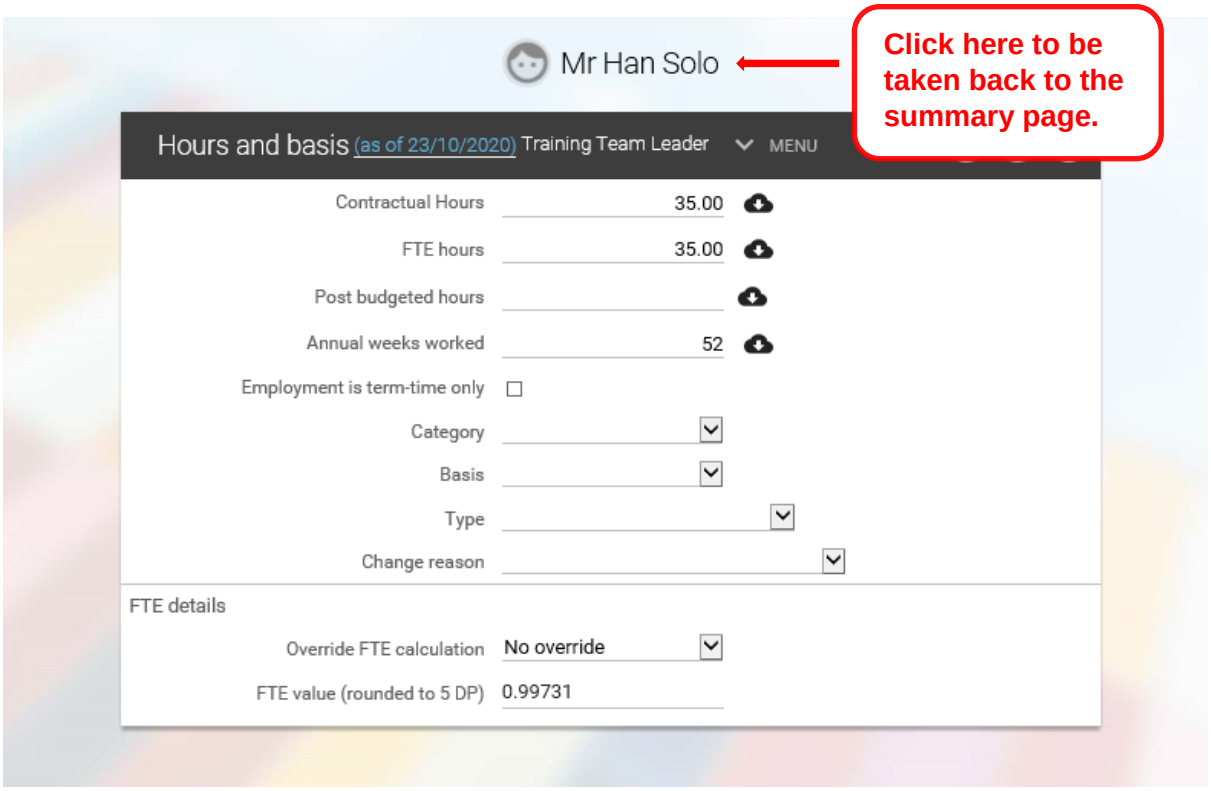
To input new PDR information click on the link **review details new.** This screen will allow you to enter details relating to the employees PDR: if an employee has more than one role make sure you select which role this review is for.

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.

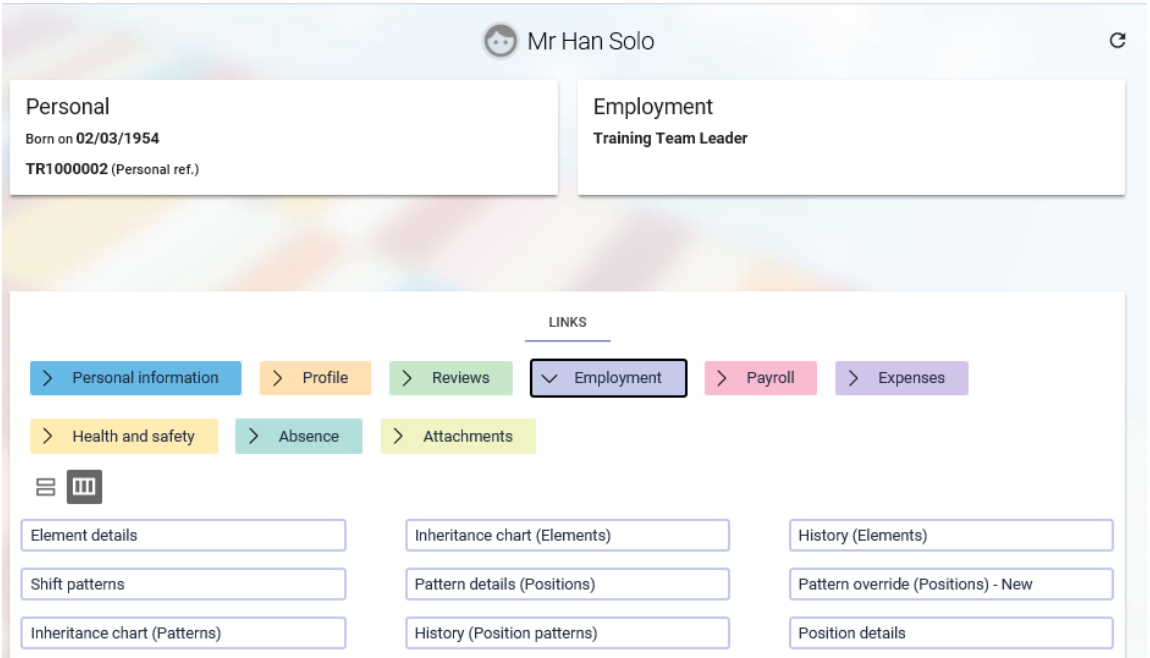


## 6. Useful information

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.

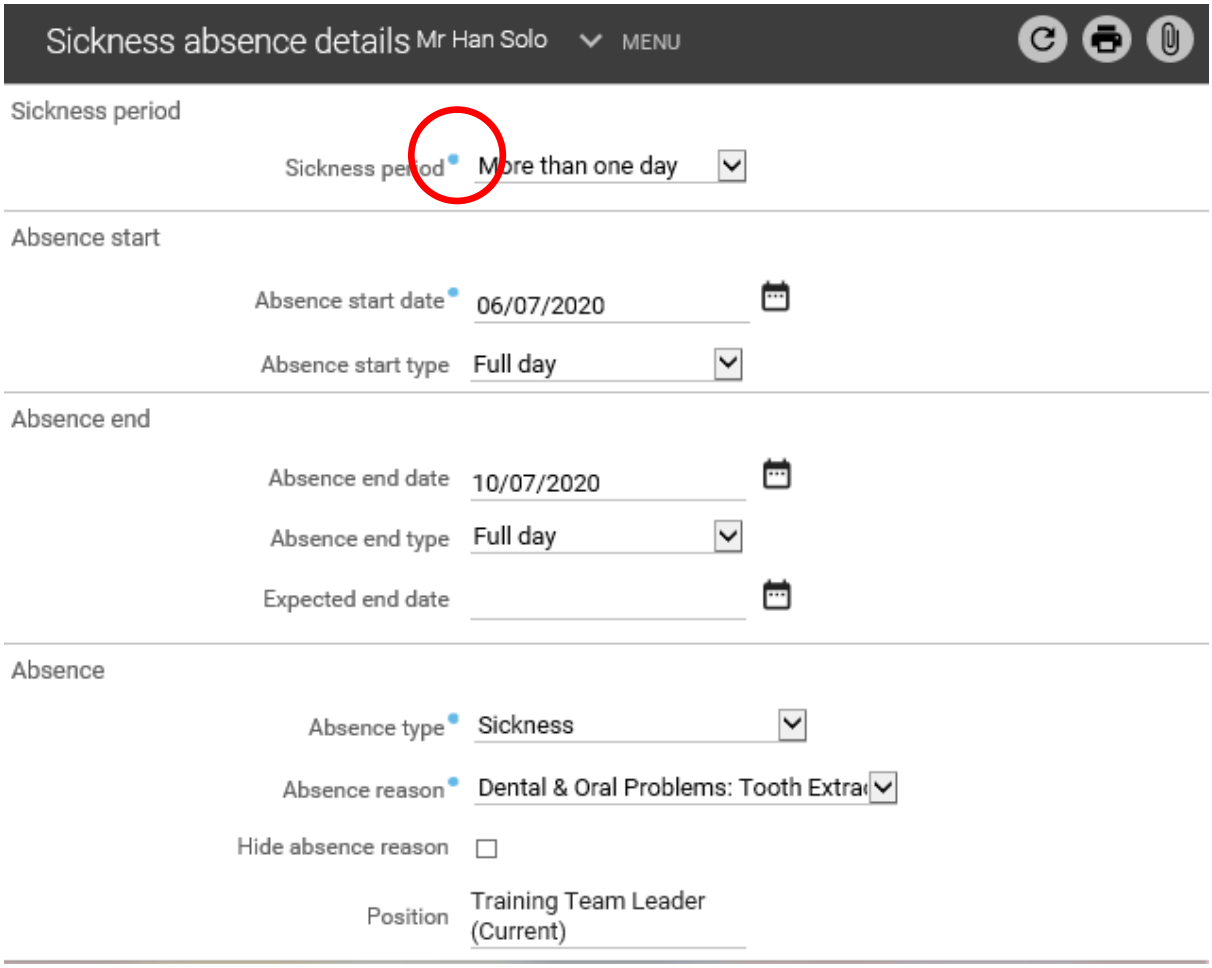


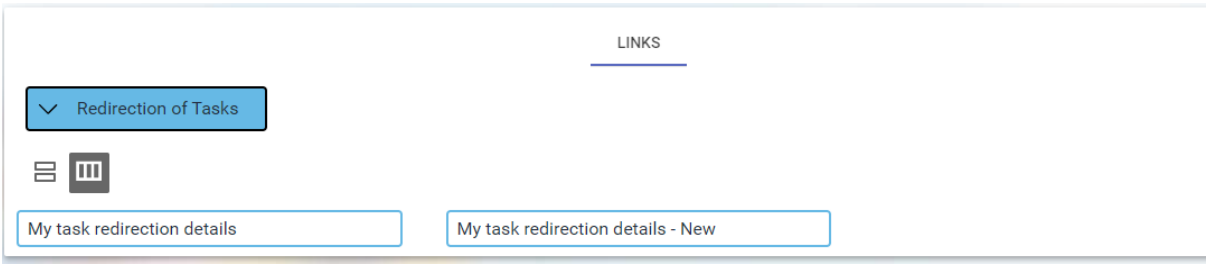

Summary page



***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.




**Tasks Redirections**

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