



University of Essex

People Manager

Quick Guide


 iTrent

 Login

User name

Password

Login

 Contact administrator

Introduction

What is People Manager

People Manager is a tool, allowing reporting managers and administrators with selected access, to manage:

- staff leave
- view sickness records
- view training course records

Further modules will be introduced to make your working life easier and more efficient will be introduced shortly.

People Manager sits within the core HR & Payroll system called iTrent. It holds the University's organisational structure, payroll and personal details of every staff member.

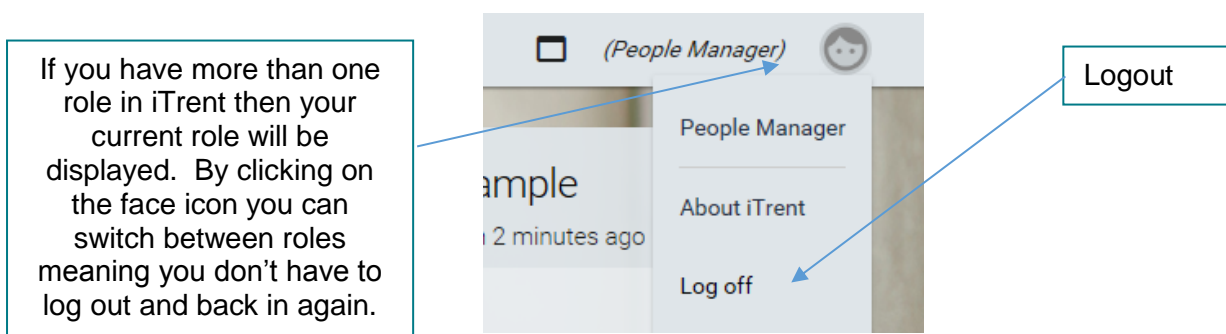
Data Protection

People Manager will only give you access to information related to staff who report to you. It is essential that you follow the [University's Data Protection Policy](#) and [Staff Privacy Policy](#) – please take the time to read these for a reminder of your responsibilities.

Important Security Information

The University's People Manager tool contains highly sensitive personal information about your staff and it is important that you use it responsibly and securely.

When you have finished using People Manager please always ensure that you log out. To do this click on the 'Logout' link in the top right-hand corner of the People Manager page.



If you have more than one role in iTrent then your current role will be displayed. By clicking on the face icon you can switch between roles meaning you don't have to log out and back in again.

It is also important that you **never let anyone else know your University of Essex username and password** as this information would allow people to access information on you and your staff through People Manager and HR Organiser, exposing a risk of identity fraud.

If at any point you feel that your information security may have been compromised you should contact the University's IT Helpdesk it.helpdesk@essex.ac.uk or call x2345.

People Manager is accessible at the following link: https://ihr.essex.ac.uk/tlive_web/

You will need your University username (**without** the @essex.ac.uk) and your University password. This is the same password you use to log on to the network and your emails.

Having trouble logging in? Your password must not contain any of the following characters " £ ~ ! | \ if it does you will need to reset it which can be done here: <https://www.essex.ac.uk/password/login.aspx>
If you are still having problems please contact the IT helpdesk.

Note: **do not** use the internet browser refresh or back/forward buttons when navigating through People Manager as this will expire your session.

Authorising Annual Leave

When a request for annual leave is submitted by an employee through HR Organiser you will receive an email request notification.



Annual Leave


Annual leave request - Action required

An absence has been requested which needs your authorisation. Log in to [People Manager](#) to view the details.

Example	Type: Personal Holiday
	Start date: 19/02/2018 FULL
	End date: 19/02/2018 FULL
	Start balance: 87.9 hours
Example Job Title	Holiday requested: 7.2 hours
	End balance: 80.7 hours
	Notes:

Please note if a bank holiday falls during a period of annual leave you **MUST ENSURE** that you book around the bank holiday dates.

NOTE: This email has been autogenerated. Please direct all queries to hrorg@essex.ac.uk



University of Essex

The request appears as above. It details the employees name and position and the start and end date of the requested holiday. It shows their starting balance and their end balance upon deduction of the requested date. The email prompts you to log in to People Manager which you can do by clicking on the People Manager link.

Remember you need your University username (without the @essex.ac.uk) and your University password. This is the same password you use to log on to the network. Refer to page 4 if you are having trouble logging in.

Once you have logged in click on the **To Do List** box, here are the tasks that require your attention.

TO DO LIST (7) PROCESSES (0) ✕

Filter All active ▾ Sort by Due date ▾ ↕

Select all

<input type="checkbox"/>	Holiday absence details <input type="button" value="REQUIRES AUTHORISATION"/> More...	* Finance Section - Business Systems * Start date: 19/02/2018 * End date: 19/02/2018 * Due: 17/02/2018	➤
<input type="checkbox"/>	Holiday absence details <input type="button" value="REQUIRES AUTHORISATION"/> More...	* Finance Section - Business Systems * Start date: 03/11/2018 * End date: 06/11/2018 * Due: 28/02/2018	➤
<input type="checkbox"/>	Holiday absence details <input type="button" value="REQUIRES AUTHORISATION"/> More...	* Finance Section - Business Systems * Start date: 04/04/2018 * End date: 04/04/2018 * Due: 28/02/2018	➤

There are two ways you can authorise annual leave. Firstly, to action the tasks quickly click on the tick box next to one or more items on the list. This will display an **Actions** button. Clicking on the button will bring up a drop-down menu giving you the options of **Authorised** or **Not Authorised** for one or multiple requests.

Caution should be taken when authorising multiple requests from this point as other team absences may already exist.

Filter: Authorised ▾ Sort by: Due date ▾ ↕

Select all

<input checked="" type="checkbox"/>	Holiday absence details <input type="button" value="REQUIRES AUTHORISATION"/> More...	* Finance Section - Business Systems * Start date: 19/02/2018 * End date: 19/02/2018 * Due: 17/02/2018	➤
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Secondly, to make a more fully informed decision, click anywhere on one task to take you to the **Holiday Absence Details**. By expanding the Peer Group Calendar you will be able to see details of any absence already authorised for your team for the requested absence period. If you are happy to authorise this request use the drop down menu to authorise and then press **Save**.

Authorisation

User name DSCOTT

Authorisation status ▾

Reason

Authorised

Not authorised

- + Holiday balances
- Peer group calendar
- Calendar selection options

Peer group Finance Section - Busi ▾

You should aim to action all holiday requests within 48 hours of receiving them. When the request has been processed a notification email will automatically be sent to the member of staff who requested the absence advising them of your decision. The task is now complete.

Amending/Cancelling Annual Leave from the Past

If an employee wishes to cancel or amend an annual leave date in the past (for example if they were ill or didn't take the absence but left it too late to cancel) they are unable to do this themselves in HR Organiser. You will need to amend this on their behalf. To do this you need to go into the **View/ Amend holiday dates** link under the **Annual Leave** folder. Please refer to the **Holiday Absence Details** section.

Amending/Cancelling Annual Leave booked for the future

Employees are unable to amend their own annual leave dates until you have authorised them. If an employee chooses to amend the dates of their annual leave you will receive a new email. You will also receive a task in your **To Do List** to approve the changes.

If an employee cancels a future request you will receive a notification email. The cancellation will also appear as a task in your **To Do List**. To clear this select it using the tick box and click **Authorised**. It will now disappear.

Holiday Absence Details

You can find this screen on your links page under **View/ Amend holiday dates**. It shows details about the annual leave dates your reportee has booked including those awaiting authorisation. This is the screen you get directed to when you click on a task in your **To Do List**.

The annual leave dates are listed down the left hand menu and the display panel shows more details once a date has been selected.

If you are required to amend an annual leave date you can do it from here. Select the period of annual leave from the left menu, change the dates as necessary in the display panel and click **Save**. It will update immediately. If you need to cancel the period of annual leave simply select it and press **Delete**. The annual leave will now be removed.

Remember your reportees can not cancel or amend annual leave dates in the past; you will have to do this for them. They can only cancel/amend dates that are yet to occur.

HOME 01/03/2018

ORGANISATION
University of Essex ORG

PEOPLE
Results 3 People
Surname
Select all Save this group

Ms Mickey Mouse
Mrs Minnie Pluto
Mr Winnie The Pooh

HOLIDAY ABSENCE LIST
Show all
12/02/2018

Ms Mickey Mouse

Holiday absence details Ms Mickey Mouse MENU

Holiday period
Holiday period More than one day

Holiday start
Holiday start date 12/02/2018
Holiday start type Full day

Holiday end
Holiday end date 14/02/2018
Holiday end type Full day

Absence
Absence type Personal Holiday
Authorisation Not applicable
Position IHR Systems Administrator (Temp) (Finance Section - Business Systems) (Current)

+ Holiday balances

SAVE DELETE

Amend to to/from dates or type (full day, part day, half day AM/PM) here

List of annual leave dates (including those awaiting approval)

Save to keep your changes

Delete to cancel the annual leave altogether

Input a Holiday Entitlement Adjustment

This screen will allow you to enter any manual adjustments you might need to make to an employee's Holiday Entitlement. For example you might need to add leave that has been carried forward from the previous leave year. This is not an automatic process and it will need to be manually done.

To make an adjustment select 'Adjust' from the Adjustment type drop down menu. Make sure you have selected the correct Holiday Period dates. A box will appear allowing you to enter the amount of **hours** you are adding on/deducting and you must also enter a reason. It is important you make the reason clear so it is easily understandable should you need to look back on the adjustment. For example "Carry forward 2013-2014". The end date will usually be the end of the annual leave year. Then click Save. The entitlement will take in to account this adjustment straight away.

If processing carryover for the next leave year this adjustment should only be made on or after the 1st April

Ms Mickey Mouse

Holiday entitlement adjustment

Employment details
 Position: iHR Systems Administrator (Temp)

Period details
 Holiday period dates: 07/11/2017 - 31/03/2018 (Part)
 Scheme name: UoE - Holiday All Grades (Ent + Bank)
 Entitlement for period: **58.1 hours (450 hours Pro Rata)**

Adjustment details
 Adjustment type: Adjust

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
		<u>15</u>	<u>Carry forward 2017-18</u>	<u>31/03/2018</u>		+	-

SAVE

Callouts:
 - Entitlement for the period: 58.1 hours (450 hours Pro Rata)
 - Annual leave year: 07/11/2017 - 31/03/2018 (Part)
 - Hours to carry forward: 15
 - Reason: Carry forward 2017-18
 - End date (do not amend): 31/03/2018

Manager Task Redirection (when out of the office)

If you know you are going to be out of the office you can set a task redirection so that any annual leave requests that come in by employees can be redirected to another manager in your absence. To do this select: **Set task redirection (out of office)** from the homepage. Here you can select a start date and an end date (if you know it) change the process type to **Redirect All** and in the **Redirect to** select the magnifying glass and enter the surname of the person you want the tasks to go to. Click Save.

My task redirections

My task redirection details New

Start date:

End date:

Process type: Task processes

Process:

Redirect to:

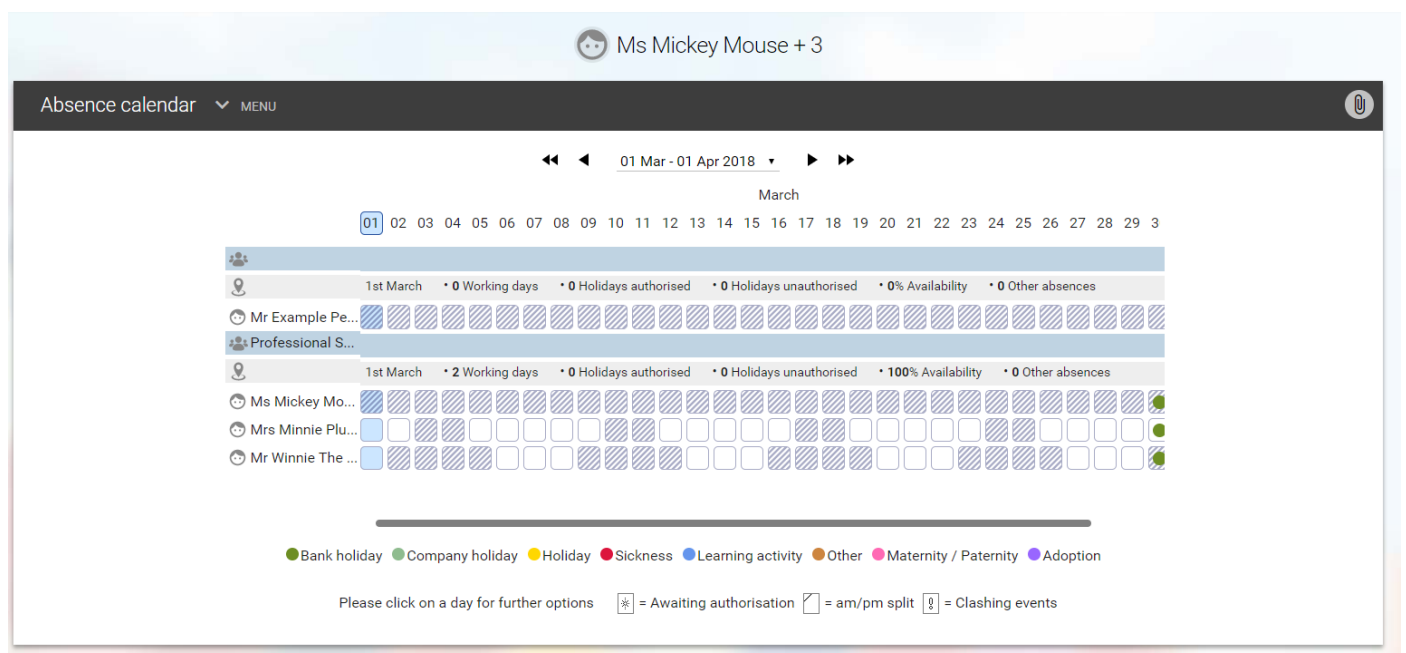
SAVE

Absence Calendar

The Absence Calendar displays all staff absences that have been recorded in iTrent. This includes:

- Learning events
- Bank holidays
- University closure days
- Maternity/Paternity absence
- TOIL (coming soon)
- Sickness

As a People Manager you can review absences within your responsibility. You can either view the absence calendar for one employee by accessing the link under the **Employee summary page** or for all of your reportees by clicking the **Out of office today** box on the homepage.



The key at the bottoms indicates which colour box relates to which type of absence.

Each absence is shown as a coloured box. When the display period or the number of people exceeds the screen capacity scroll bars are provided to enable you to move left/right up/down. The headings to the calendar and the people names will always remain in focus.

When you select a specific date range in the display period you will need to click on OK for it to update.

Specific date range

From x ↕ ▼

To

OK CANCEL

You also have the option of adjusting the display period by clicking on the arrows. This will take you back or forward 3 months or back or forward 1 month.




◀◀ ◀ 01 Mar - 01 Apr 2018 ▶ ▶▶

When you move the cursor over the cells in the display a pop up is shown. This holds the details of the absence and the person or where no absence is recorded just the person. The details include name, position, day and date. Type of holiday, status (e.g. awaiting authorisation), position, working pattern and working pattern start date. Some employees will hold more than one position.

If you right click on any date in the absence calendar this will bring up a menu of quick links, including Check holiday entitlement and Check patterns.

Name: Ms Mickey Mouse
Position(s): iHR Systems Administrator (Temp)
Personal reference: 4012331
Payroll reference(s):
Day: **Monday**
Date: 02/04/2018

Type: Bank holiday
Period: 02/04/2018 - 02/04/2018
Position: iHR Systems Administrator (Temp) (0010YBA)
Occupancy: 07/11/2017 -
Reporting: Position 2 - Finance Section - Business Systems

 = Awaiting authorisation  = am/pm split  = Clashing events

Managing Learning

Under the **Learning Record** section on your **Employee Summary Page** you can view the personal learning of your employees.

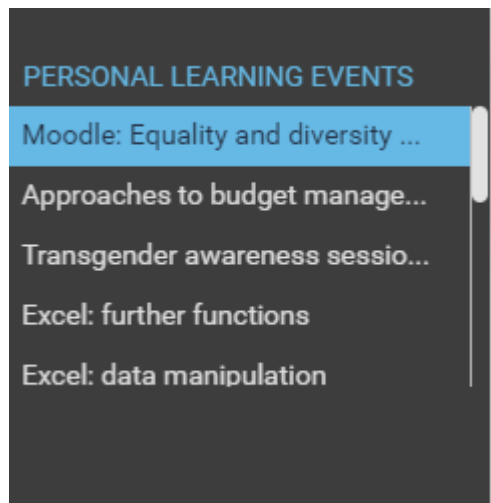
LINKS

> Personal information > Employment Information > Annual Leave > Sickness > Other Absence



> Maternity/Paternity > Absence Calendar > Timesheets ▼ Learning Record

[View employee learning record](#)

You will then be able to view all of your employees personal learning. The list of events will show in the left side panel, you can click on one of these links to view more information. This list will include **Participant events** which are learning activities that your employees have booked or attended since the launch of HR Organiser as well as **Personal learning events** which include historical learning activities that have been loaded from legacy systems. This is also where you will see any personal learning that employees have entered themselves. This could include external courses/conferences or workshops that they have attended and have recorded in HR Organiser.

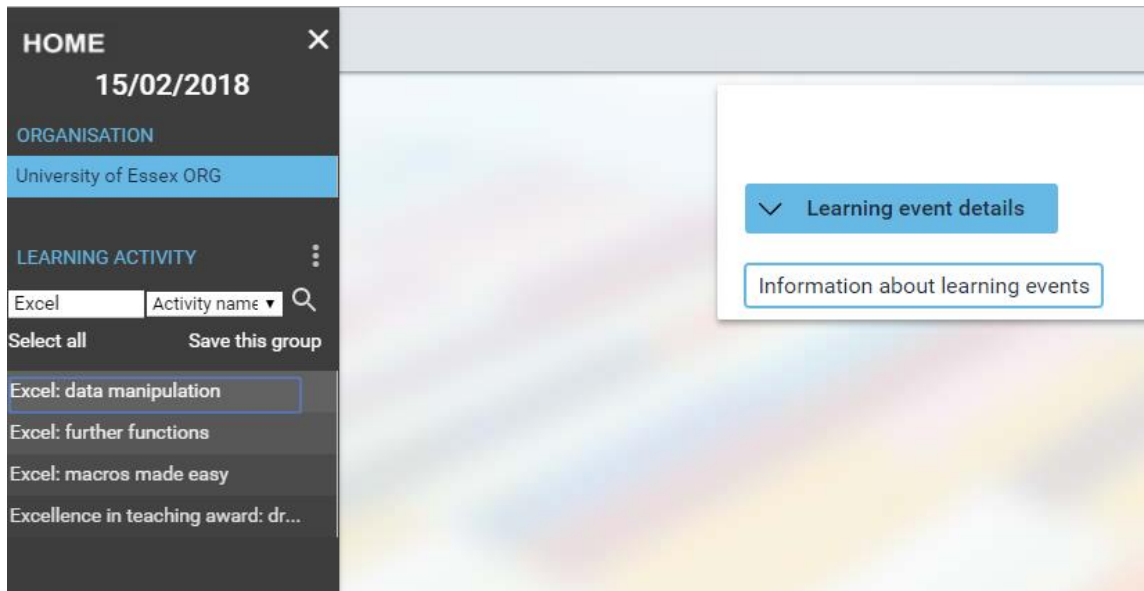


Event

Event title	<input type="text" value="Moodle: Equality and dive"/>
Internal	<input checked="" type="checkbox"/>
Start date	<input type="text" value="01/01/1970"/> 
End date	<input type="text" value="03/08/2016"/> 
Duration	<input type="text"/>
Learning hours	<input type="text"/>
Learning event code	<input type="text" value="PR_Equality"/>
Score	<input type="text"/>

Viewing information on available courses

Within People Manager you can also view which learning activities are available and see an overview of them. On the homepage select **Upcoming learning events**. You will be prompted to enter a search for an activity name. Type the name of the activity you wish to view, for example: excel
A list of all the courses which contain the text 'excel' are displayed.



To view an overview of the course click on it and further details will be displayed on the right hand side in the display panel.

