



University of Essex

People Manager

Quick Guide

iTrent application

iTrent

Login

* Username (required)

* Password (required)

Login >

Contact administrator

Powered by MHR

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 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

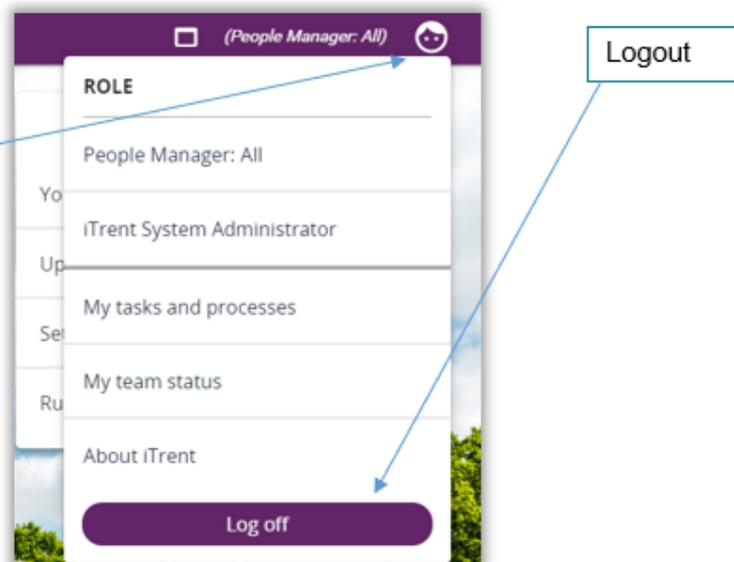
People Manager will only give you access to information related to staff who report to you. It is essential that you follow the [University's Data Protection Policy](#) and [Staff Privacy Policy](#) – please take the time to read these for a reminder of your responsibilities.

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 'Log off' 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 via it.helpdesk@essex.ac.uk or call extension 2345.

People Manager is accessed via the following link:

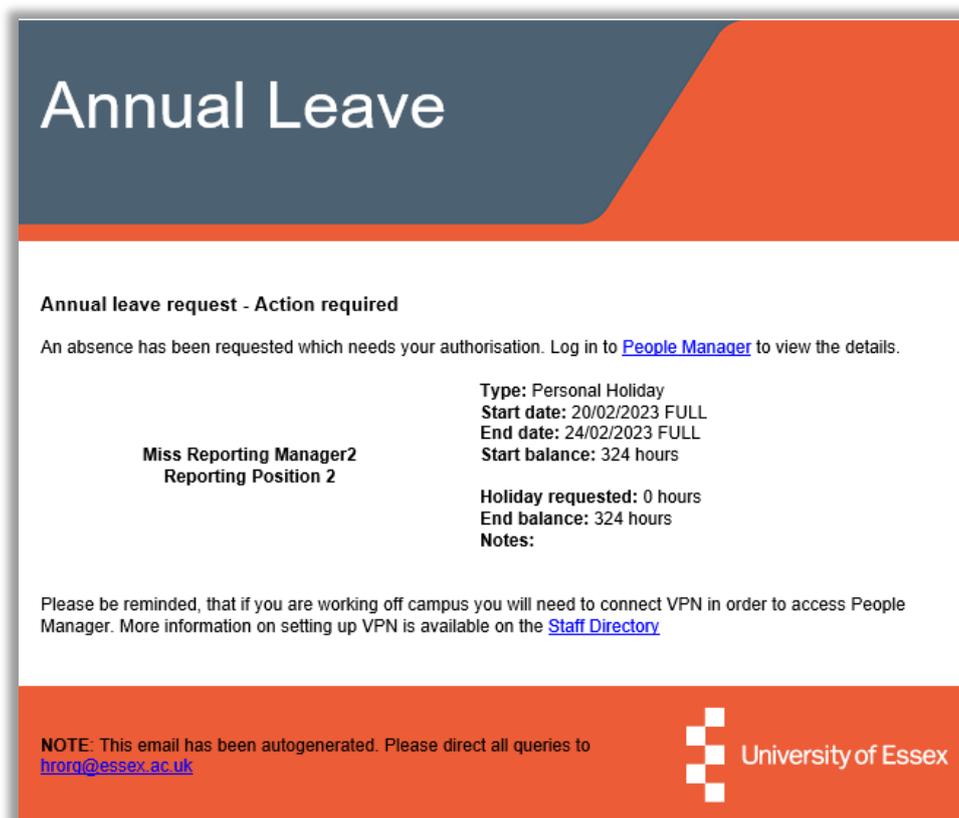
https://ihr.essex.ac.uk/tlive_web/wrd/run/ETADM001GF.open – you will need to select your employer (University of Essex / UECS / WHH) when prompted and then you will be logged straight in. If you have multiple iTrent roles then choose 'People Manager' from the dropdown list.

Having trouble logging in? Please contact the IT helpdesk at it.helpdesk@essex.ac.uk

*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

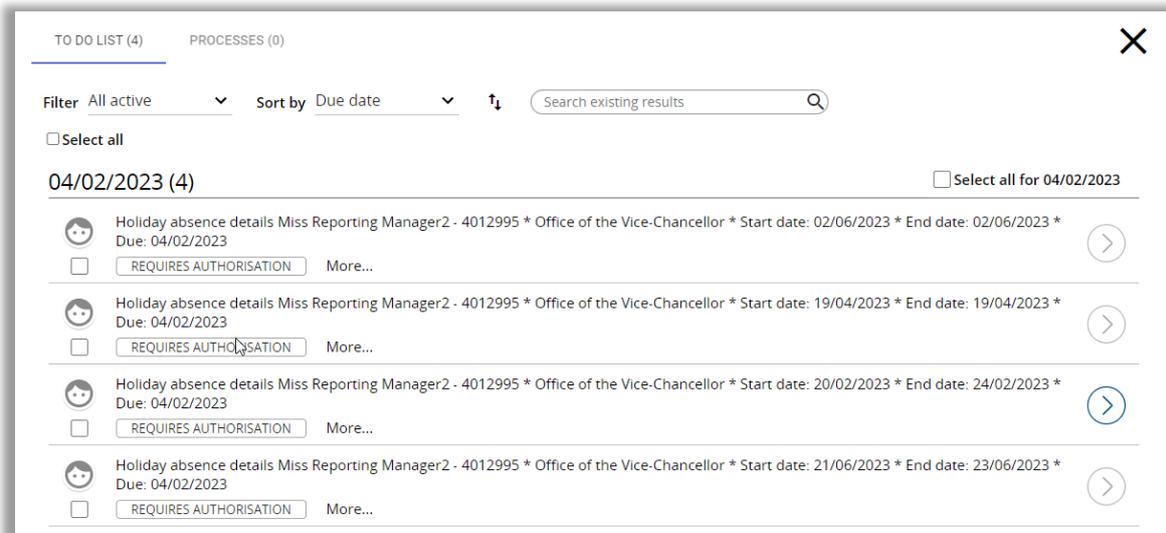
When a request for annual leave is submitted by a reportee through HR Organiser you will receive an email request notification.



The request appears as above. It details the reportee's 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.

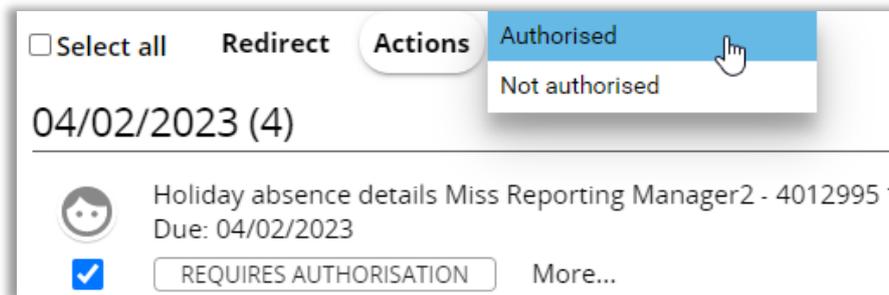
The email prompts you to log in to People Manager which you can do by clicking on the People Manager link in the email, or you can [log into People Manager](#) on the website – you will need to select your employer (University of Essex / UECS / WHH) when prompted and then you will be logged straight in. If you have multiple iTrent roles then choose 'People Manager' from the dropdown list. Refer to page 2 if you are having trouble logging in.

Once you have logged in, click on the **To Do List** box and you will be shown the tasks that require your attention.



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 dropdown menu giving you the options of **Authorised** or **Not Authorised** for one or multiple requests.

Caution should be taken when authorising multiple requests in this way, as other team absences may already exist.



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 absences already authorised for your team for the requested absence period. If you are happy to authorise this request, use the dropdown menu to authorise and then press **Save**.

Authorisation

User name

Authorisation status *

Reason

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 a reportee 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

Reportees' are unable to amend their own annual leave dates until you have authorised them. If a reportee 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 a reportee 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

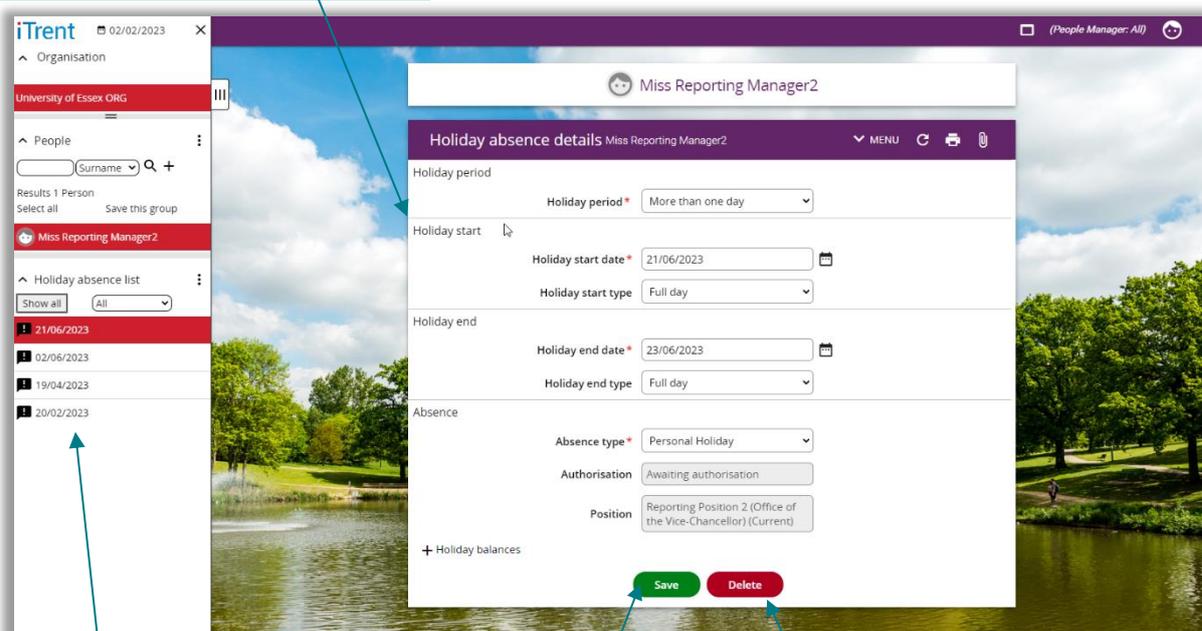
You can find this screen on your links page under **View/amend holiday dates**. It shows details about the annual leave dates your reportee has booked including those awaiting authorisation. This is the screen you get directed to when you click on a task in your **To Do List**.

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' cannot 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.

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

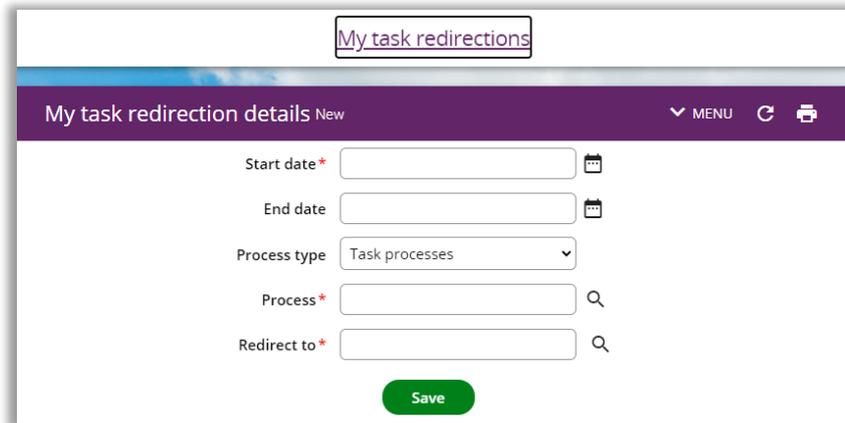


List of annual leave dates (including those awaiting authorisation)

Save to keep your changes or delete to cancel the A/L altogether

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 from reportees' 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** box, select the magnifying glass and enter the surname of the person you want the tasks to go to. Click Save.



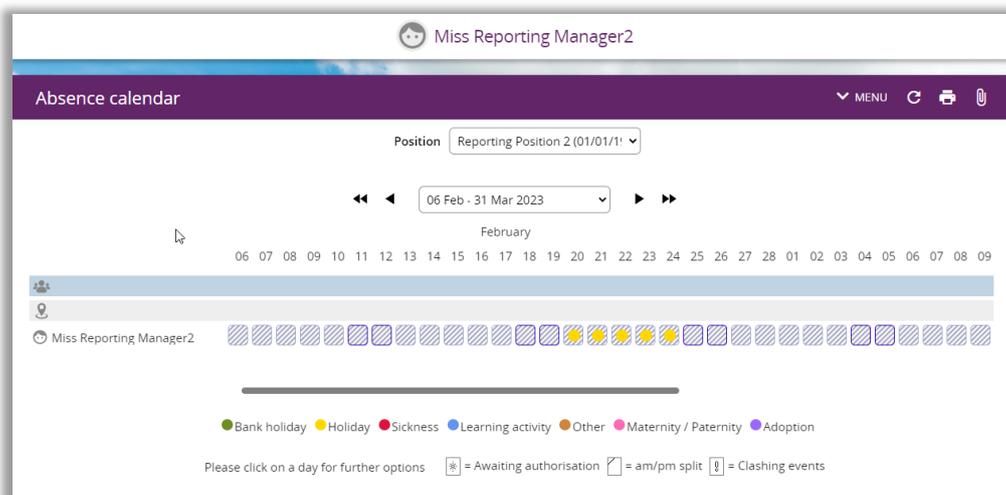
The screenshot shows a web form titled "My task redirections". The main heading is "My task redirection details New". There are several input fields: "Start date" with a calendar icon, "End date" with a calendar icon, "Process type" with a dropdown menu showing "Task processes", "Process" with a search icon, and "Redirect to" with a search icon. A green "Save" button is located at the bottom center of the form.

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/Adoption absence
- TOIL (coming soon)
- Sickness

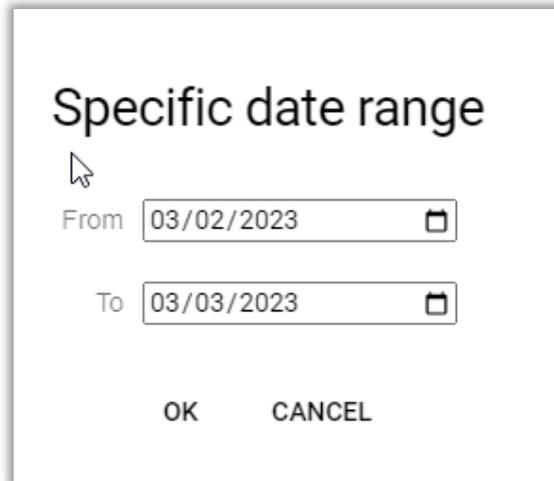
As a People Manager you can review absences within your responsibility. You can either view the absence calendar for one reportee by accessing the link under the **Reportee summary page** or for all your reportees' by clicking the **Out of office today** box on the homepage.



The key at the bottom 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, and 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.



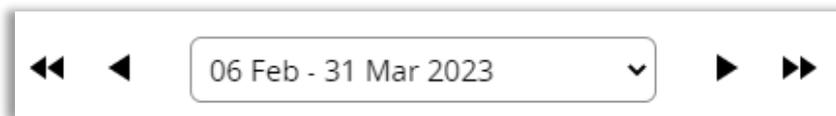
Specific date range

From 03/02/2023

To 03/03/2023

OK CANCEL

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



◀◀ ◀ 06 Feb - 31 Mar 2023 ▶ ▶▶

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, date, type of holiday, status (e.g., awaiting authorisation), position, working pattern and working pattern start date. Some reportees' will hold more than one position.



Name: Miss Reporting Manager2
Position(s): Reporting Position 2
Personal reference: 4012995
Payroll reference(s):
Day: **Tuesday**
Date: 21/02/2023

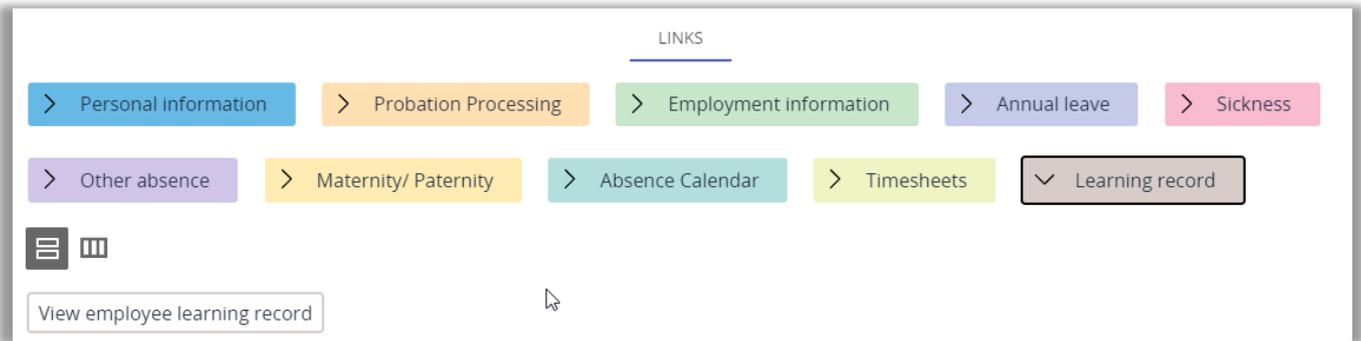
Type: Personal Holiday
Period: 20/02/2023 - 24/02/2023
Status: Authorised
Position: Reporting Position 2
(0011KTV)
Occupancy: 01/01/1900 -
Reporting: Commercial Applications
Systems Administrator - General
Systems - Office of the Vice-
Chancellor

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.

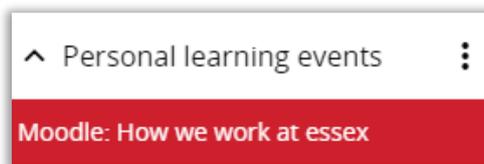
 = Awaiting authorisation
  = am/pm split
  = Clashing events

Managing Learning

Under the **Learning Record** section on your **Reportee Summary Page**, you can view the personal learning of your reportees'.



You will then be able to view all your reportees' 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 reportees' 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 reportees' have entered themselves. This could include external courses, conferences, or workshops that they have attended and have recorded in HR Organiser.



Event

Event title * Moodle: How we work at essex

Internal

Start date * 01/02/2023 

End date * 01/02/2023 

Duration

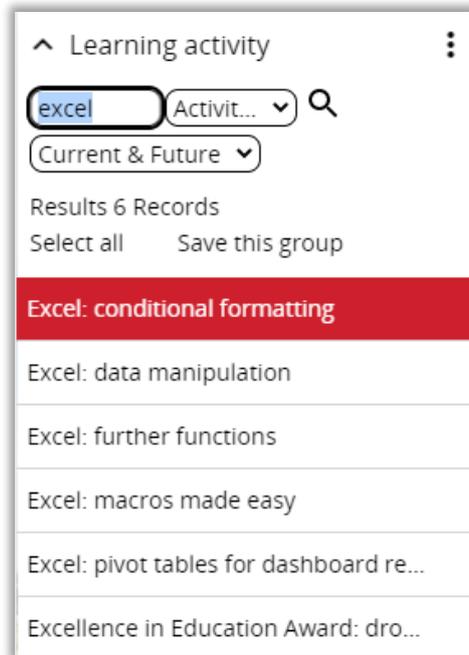
Learning hours

Learning event code PR_HowWeWorkAtEssex

Score

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**. It will show a list of Scheduled events, but you can also 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 select **Information about learning events**. Further details will be displayed on the right-hand side in the display panel.

