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## 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 online and view employees learning activities. It has a host of other reporting benefits and in the future, further modules will be introduced to make your working life easier and more efficient.

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.

### Navigating People Manager

People Manager is accessible at the following link:
https://ihr.essex.ac.uk/live_web/wrd/run/etadm001gf.open

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.

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

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

The Homepage

When using People Manager all the information is accessed through the homepage. This is the first screen you see once you log in to iTrent. It displays features you can use to navigate around the system.

Employee Summary Page

From the homepage select ‘Your Reportees’ and then select an employee to view from the panel on the left side of the screen. The employee summary page gives an overview of the employee’s position, outstanding annual leave and sickness. It is also where the links can be accessed to view further details or complete an action.
Navigating between pages

When in a page you can access more links within that section by clicking on menu or on the persons name to return to the summary page.

Click to return to the homepage

Select an employee

Links – Click on a coloured folder to expand the links relating to that area.

Annual leave remaining and sickness days taken

Click to view more links within the same coloured folder

Click to return to the employee summary page.

Choose a new employee to view the same screen for a different person
Adding a ‘New View’

Click to add a new view – This will open as a new tab. When you log out this will log you out of all open tabs.

Team Structure

Once you have clicked on ‘Your reportees’ your staff will be listed on the left hand side of the screen.

Searching for People

If you have a lot of employees reporting to you, you may wish to use do a People Search to filter out some of the results. You can search by a specific employee using a range of search criteria in the dropdown menu. You can also do a more detailed search by clicking on the three dots and then Advanced Search. If the person has left within the last 30 days select the Include Leavers tick box.
Advanced Searches

Advanced searches allow you to run queries on data which can then be exported to Excel. For example a useful advanced search may be to identify the number of staff that have been off sick in the last 3 months or which staff had started at the University before a given date. Results will only be displayed for staff who report directly to you.

When you click on Advanced Search the criteria screen will then appear where you can set your search criteria. For example you can choose ‘Times sick in the last 3 months’ ‘is greater than’ and you can enter 1. This will bring back any employees that have had more than one period of sickness in the last 3 months. You can add more than one set of criteria. Simply click on the + at the end of the row to add another row.

You can also choose to export the results to Excel, this will open up a new Excel document.
Viewing Employee Related Data

**Personal Details:** this screen allows you to view name, title, gender, previous names and start date at the organisation. Data contained on this page must be updated via Human Resources Section with submission of supporting documentation.

**Contact Details:** this screen allows you to view the contact details of your reportee. The contact information held for each reportee is summarised in People Manager’s left hand menu. Any changes to the contact details must be completed by your staff member by logging into HR Organiser.

**Address Details:** this screen allows you to view the home address of your reportee. Any changes to the address details must be completed by your staff member by logging into HR Organiser.
Emergency Contact Details: the emergency contact details screen allows you to view the emergency contact details of the reportee. Any changes to emergency contact details must be completed by your staff member by logging into HR Organiser.

Probationary Period Details: this screen details the probationary start and end dates and whether the probation is complete.

Key Dates (DOB & Retirement): this screen contains key dates including date of birth and expected retirement date.

Position Details: the position details screen displays details relating to the reportee’s position, including job title, position start date, location, position end date and reporting manager.

End Date (if fixed term): this screen displays the occupant name, start date and expected end date if there is one.

Hours and Contract Type: this screen shows the contractual hours and FTE hours for the reportee. It also shows the category, basis and type of their employment. Any changes to this screen should be made via HR.

Grade and Payscale Values: this screen shows the employees pay scale salary.

Position costing/ funding: account and Costcode where salary or any additional costs will be charged to.

Position Previous Occupants: this screen shows previous occupants of an employee’s position and who their reporting manager was. This screen also includes occupancy start and end dates, grade, FTE and reporting manager position.

Working Pattern: this screen shows the working pattern of the reportee. Where the reportee has more than one work pattern you can select the relevant one from the left-hand menu. The standard full time working day for employees of the University of Essex is 7 hours and 12 minutes (7.2 hours per day).

It is imperative that the working pattern held is correct as this is what drives annual leave and absence calculations. Incorrect patterns will calculate the wrong amount of annual leave taken by an employee, potentially leaving them short. Any changes to working patterns must be reported to Human Resources immediately (staffing@essex.ac.uk). Who will update this information.

The system can accommodate various working patterns including shift, compressed, average and rotating shifts. For further information on working patterns please refer to the working pattern information sheet available on the People Manager web page.

Managing Absence

Holiday Entitlement/ Balance

This screen shows details of the leave booked by an employee. This includes their annual leave entitlement, all the annual leave they have requested and any bank holidays and University closure days which have been automatically loaded in to the system.

All employees of the University of Essex are entitled to 201.6 hours (28 days) basic annual leave. This is pro-rated for part time employees.
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**

**Example Job Title**

- Type: Personal Holiday
- Start date: 19/03/2018 FULL
- End date: 19/03/2018 FULL
- Start balance: 57.9 hours
- Holiday requested: 7.2 hours
- End balance: 50.7 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.

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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.

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.*

Secondly, to make a more fully informed decision, click anywhere on one task to take you to the **Holiday Absence Details**. If you are happy to authorise this request use the drop down menu to authorise and then press **Save**.

Authorisation

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<th>DSCOTT</th>
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<tr>
<td>Authorised</td>
<td>Not authorised</td>
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**Holiday balances**
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 screen. 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 under the Annual Leave links folder and then 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.*
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 2017-18”. 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.
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.
Managing Learning

Viewing information on employees learning activities

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

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.
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.

Absence Calendar

The Absence Calendar displays all staff absences that have been recorded in iTrent. This includes:
- Learning events (coming soon)
- 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 01/03/2018  
To 01/04/2018  

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.
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.

Additional information:

- **Half-day AM absence** – the left side of the cell is in the absence calendar
- **Half-day PM absence** – the right side of the cell is in the absence calendar
- **AM/PM split** – when two absences are split across a single day (e.g. one absence ends at 11am and the next starts are 11am or later) then the day is marked to indicate a split but only one of the absence colours is displayed.
- **Clashing events** – when an absence has been recorded that clashes with another absence (a sickness on the same date as a personal holiday for example) the day of the absence will display an exclamation mark (!) the pop up will display the details of the absences that are clashing
- **Working pattern** – when an employee has a working pattern attached and you have selected working patterns to be displayed then each working day is shown with an inner box. Absences that occur on a working day are show with their absence colour and box (if you only want to display working patterns for absences then you should set the working pattern colour to be the same as the background colour)

\[\text{\textbullet} = \text{Awaiting authorisation}, \text{\textbox{}} = \text{am/pm split}, \text{\textcircled{0}} = \text{Clashing events}\]

**Yearly view**
When a single employee has been selected you are able to display the calendar in a yearly view. Details about each absence are displayed as a pop up as you move your cursor over the dates. You can view by either dates or days. The different views offer identification of trends e.g. absences relating to the same period each month (around monthly deadlines?) or absences relating to particular days of the week (Friday/Monday absences).

**Sickness Absence Information**

**Sickness Entitlement Summary**
This screen shows details of any sickness entitlement taken by an employee including details of the sickness scheme, entitlement to paid sickness absence and sickness days used and those available.
**Sickness Absence Details**
This screen shows details of the sickness period including date and nature of sickness taken. You can view details of different absences by selecting an occurrence from the left-hand menu.

![Sickness absence details](image)

**FAQ’s**

**Logging In and Security**

*When I try to log in to People Manager it says my log in details are incorrect?*  Make sure you have entered your username *without* the @essex.ac.uk. Your password is your University password, has this recently changed? Your password must not contain any of the following characters as these are unsupported by the system " £ ¬ ‹ | "

Do you have a current contract with the University? Once you have left the University you will no longer have access to People Manager or HR Organiser.

*How secure is the information held in People Manager?*  The data within iTrent is held within a secure database on campus. Access to data within the system requires an iTrent user ID – your University username and password. Each user ID has a security profile that restricts access to only the areas they need to do their job and only the staff for whom they have responsibility or administrative rights. Connections to iTrent are encrypted, look for the padlock symbol in your browser. People Manager and iTrent can only be accessed behind the University of Essex firewall. To ensure the security of the information held in the system you should also always remember to log out when you finish using People Manager. Remember to never share your password with anyone.
**Absence**

Do my employee’s need to book the bank holidays off? No. The system automatically calculates and deducts the bank holidays for them.

Can my employee’s book leave for next year? Yes, they just need to book it in the normal way; it will automatically come out of next year’s allowance.

I don’t think my employee’s entitlement is correct? Please ask your employee to check the Absence User Guide as this gives examples of how annual leave entitlements are calculated. If you are still having problems please contact us.

How do I process carryover? It should be noted that unused holiday entitlement cannot normally be carried over from one leave year to the next. Any alternative arrangements should be discussed with your employee and authorised by yourself. Carryover should never be more than 5 days. To add carryover to an employee’s entitlement please refer to the Input a Holiday Adjustment section.

My employee booked annual leave but actually ended up being off sick, what should I do? If the employee didn’t actually take their annual leave then you can go into People Manager and remove it. This way their balance will be credited back with the leave they didn’t take. See the Amending/Cancelling annual leave sections.

My employee has been on Maternity/Paternity/Adoption leave, will the system show their accrued annual leave and bank holiday entitlement for the period of their absence? The system will have the outstanding annual leave balance available to be taken but there will need to be an adjustment made to add any bank holiday amounts to their entitlement. This should be done automatically by HR when your employee returns but if you think it does not look correct, please contact the HR department who will be able to help you further.

My employee has been absent due to long term sickness, will the system show their accrued annual leave and bank holiday entitlement? The system will have the outstanding annual leave balance available to be taken but there will need to be an adjustment made to add any bank holiday amounts to their entitlement. This should be done automatically by HR when they return but if you think it does not look correct, please contact the HR department who will be able to help you further.

**People Manager**

I am not getting my employee’s leave requests? You will need to notify HR as there might be a chance you have not been set up as their reporting manager.

I can’t see a member of my team when I log in to People Manager? You will need to notify HR as there might be a chance you have not been set up as their reporting manager.

I am going to be out of the office, who will approve my reportee’s annual leave whilst I am away? If you know you are going to be out of the office you can set a Manager Task Redirection for the dates you are going to be away. See the Manager Task Redirection section. This way holiday requests will go to another manager in your absence. It is important that this is agreed with the other manager before you go away and they are aware of this. Remember managers are the only ones who will have access to People Manager.

My employee has two jobs; I am only their manager for one. How does this affect me? You will receive holiday requests for only the periods of time when you are their manager. When they are in their other role the leave requests will go to the manager for that job.

How long do I have to approve holiday requests? You should aim to action all holiday requests within 48 hours of receiving them.

I am a new manager; do I need to do anything? People Manager is automatically given to you. If you are not yet able to access the system please contact HR to ensure your reportees have been correctly assigned to you by emailing staffing@essex.ac.uk.

I am leaving the University, what should I do? You will need to ensure your leave requests are redirected to another manager until your replacement is due to start.
Employee Information

**Why do some of my reportee's position details have a starting date of 01/01/1990?** Some of the details that iTrent displays have been given a start date of 01/01/1990 to denote that the condition is a standard setting that has been in place from the outset of the system. Therefore, when a reportee has a start date of 01/01/1990 against any of their details then this denotes that there is employment history held within our legacy HR systems.

**My employee’s working pattern is wrong?** You need to contact HR immediately so this can be corrected. Absence is driven on working pattern so it is crucial that it is correct.