

iTrent Self Service Leave & Bank Holiday Guide for Managers



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ANNUAL LEAVE OVERVIEW

Annual Leave within iTrent has a planned go live date of 1st April 2022 and ALL ANNUAL LEAVE booked from this date MUST be processed within iTrent. Managers should communicate with teams and ensure employees are aware of this and have familiarised themselves with the process.

An employee can book annual leave in past and in the future, amend and delete future requests. An employee is not able to amend or delete leave which has already commenced or has past.

A manager has access to create new, amend and delete annual Leave requests in the past and future on behalf of their reportees.

If annual leave request is rejected or deleted the annual leave balance will automatically be re-credited.

Employees can book annual leave in adhoc hours, half days/shifts (AM/PM) and whole days/shifts, this deducts from the entitlement in hours. This is to accommodate part-timers, compressed hours, changes in FTE hours, starters and leavers. The number of hours deducted from the request will be based on the standard work pattern with the exception of a specified time or if a pattern override is recorded. Leave for AM or PM will deduct half the number of standard hours on the work pattern.

Annual leave entitlement is issued in hours for all employees, full or part time. Entitlement is pro-rata for employees who work part time or are only working for part of a leave year, for example fixed term, new starter, leaver. Bank Holidays and where applicable floating days are added to the annual leave entitlement (including additional days for long service as per the terms and conditions of service), 3 days unpaid leave (if applicable), purchased leave (if applicable) and carry forward leave (if applicable). Leave entitlement will be stated in Statement of Particulars.

The entitlement and deductions are based on certain data within iTrent and managers should ensure that this data is checked and corrected:

- Ensuring that annual leave agreed to be carried forward from the previous leave year has been entered correctly – this part of the process will be automated from 1st April 2023 in accordance with policy limits; any carry forward exceeding this must have the necessary approvals
- The employee's correct reporting manager is attached (Employment Section)
- Their correct work pattern is attached (Employment Section)
- Ensure any Annual Leave you have already approved for the new leave year has been entered and authorised through the system
- The employee's correct email address is held in Contact – User Email
- Annual Leave and bank holiday scheme attached as a term and condition – you can run the holiday Entitlement Report and check staff have the correct Annual Leave Scheme and correct entitlement
- Contractual hours and FTE hours are correct
- Expected occupancy end date / Fixed Term status is correct including a start and end date in the annual leave/bank holiday schemes for those starting or leaving part year.
- Their reckonable service is correct

When an employee requests annual leave via Employee Self Service (ESS), an automated email triggers to the Reporting Manager or designated Officer to review the Annual Leave request and authorise or reject via a task in their to do list.

An email will trigger to the employee to confirm or reject the request once the manager has reviewed the request and actioned the task in their To Do List.

Please direct queries regarding annual leave policy to your HR Business Partner.

Any annual leave entitlement queries should be sent to HRTransactionalServices@bury.gov.uk

MANAGING ANNUAL LEAVE

OVERVIEW OF PROCESS - EMPLOYEE REQUESTING LEAVE

- Employee requests leave via ESS
- Manager receives notification by email
- Manager logs into iTrent & navigates to the 'To do list'
- Manager reviews details of request (task), reviews Calendar
- Manager either authorises or rejects the request
- Employee receives notification by email of managers decision


OVERVIEW OF PROCESS - MANAGER BOOKING LEAVE ON BEHALF OF EMPLOYEE

- Manager logs into iTrent & navigates to 'New Holiday Details' link
- Manager records the leave & saves
- Employee & Manager receive email confirmation

BASIC NAVIGATION

The Absence functionality is accessed through the absence tab:



to return to the Full main menu at any time select the iTrent logo 

Select Absence to display all the Absence folders

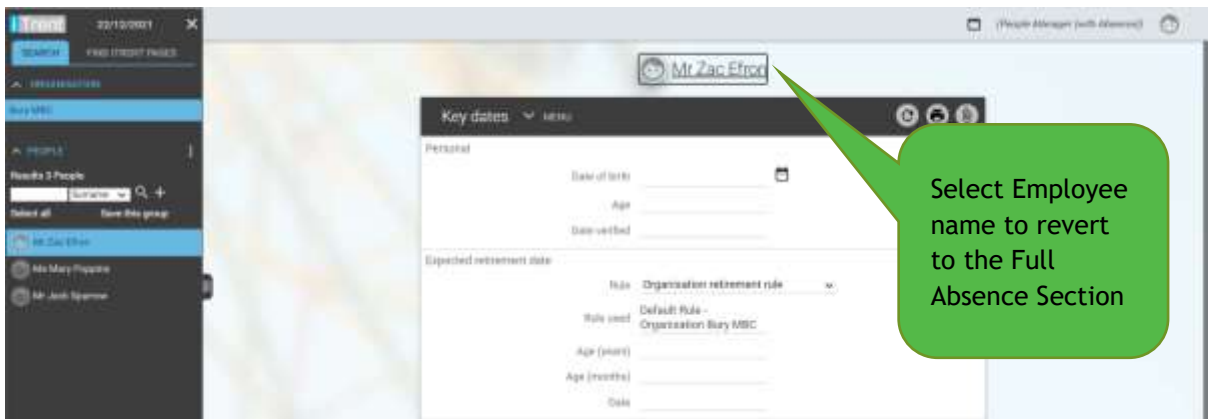


Select the Folder to display the forms within the Folder



Select the form and to display other forms in the selected Absence Folder select the menu icon on the top of the form **MENU**

To return to all Absence Folders in the Absence Section select the employee name



Select Employee name to revert to the Full Absence Section

NEW VIEW

To open several forms to compare data use the New View Option to open a new browser tab



Select New View

HOW TO - RECORD NEW HOLIDAY DETAILS



Select holiday folder

Select New Holiday Details form

Holiday absence details New MENU

Holiday period
 Holiday period* More than one day

Holiday start
 Holiday start date*
 Holiday start type Full day

Holiday end
 Holiday end date*
 Holiday end type Full day

Absence type*
 Authorisation

Position
 Casual General Assistant(Civics) (0
 Deputy Head Teacher (01/06/2021)

+ Holiday balances

Select the duration of the Holiday, more than one day, full day or part day

Subject to the period the fields / dropdown change

MORE THAN ONE DAY

If the Period overlaps a bank holiday the request will exclude hours already deducted. If a request has already been made during the period an error will flag so the original request can be amended

Holiday absence details New MENU

Holiday period
 Holiday period* More than one day

Holiday start
 Holiday start date* 23/12/2021
 Holiday start type Full day

Holiday end
 Holiday end date* 31/01/2021
 Holiday end type Full day

Absence
 Absence type* Annual Leave
 Authorisation

Position
 Casual General Assistant(Civics) (0
 Deputy Head Teacher (01/06/2021)
 Director Systems Administrator (23/1)

+ Holiday balances

End date the last day of the Annual leave - Not the first day the employee is back

Start date is the first day of the annual leave

Select Absence Type Annual Leave

Select the position and SAVE

FULL DAY

Full day is used for booking one days annual leave, the hours deducted will be based on the standard hours on the work pattern, refer to pattern override to edit the hours/minutes lost.

The screenshot shows the 'Holiday absence details New' form. The 'Holiday period' dropdown is set to 'Full day'. The 'Holiday start date' is 23/12/2021. The 'Absence type' is 'Annual Leave'. The 'Position' dropdown is open, showing options: 'Casual General Assistant(Civics) (0', 'Deputy Head Teacher (01/06/2021)', and 'Senior Systems Administrator (23/1'. A green 'SAVE' button is at the bottom.

Callouts:

- Enter date of the annual leave (points to Holiday start date)
- Select Absence Type Annual Leave (points to Absence type)
- Select the position and SAVE (points to Position)

PART DAY

If an employee wishes to take part of a day as annual leave then the Part Day option allows for AM, PM or to specify the exact hours take off.

The screenshot shows the 'Holiday absence details New' form. The 'Holiday period' dropdown is set to 'Part day'. The 'Holiday start date' is 23/12/2021. The 'Holiday start type' is 'Part day'. The 'Absence type' is 'Annual Leave'. The 'Position' dropdown is open, showing options: 'All Jobs', 'Casual General Assistant(Civics) (0', and 'Deputy Head Teacher (01/06/2021)'. A green 'SAVE' button is at the bottom.

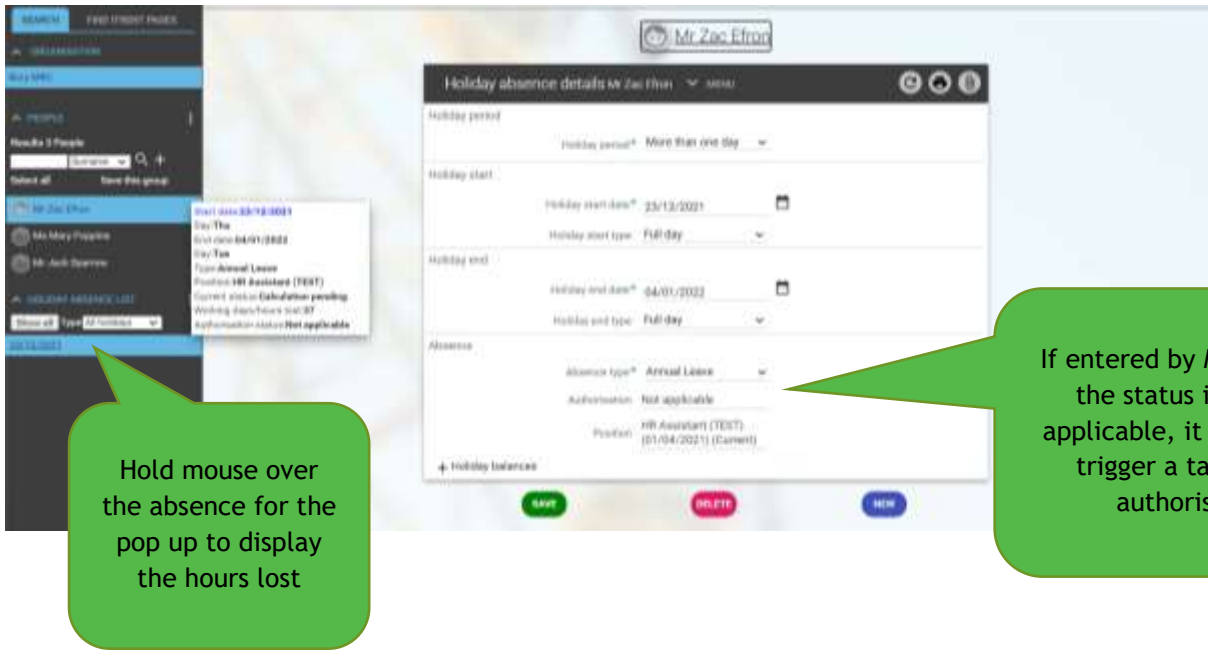
Callouts:

- Select Period Part Day and Holiday start date (points to Holiday start type)
- Select Part Day to enter specific hours:min to be deducted in the hours absent field (points to Hours absent)
- Select Absence Type of 'Annual leave' and the position and SAVE (points to Absence type)



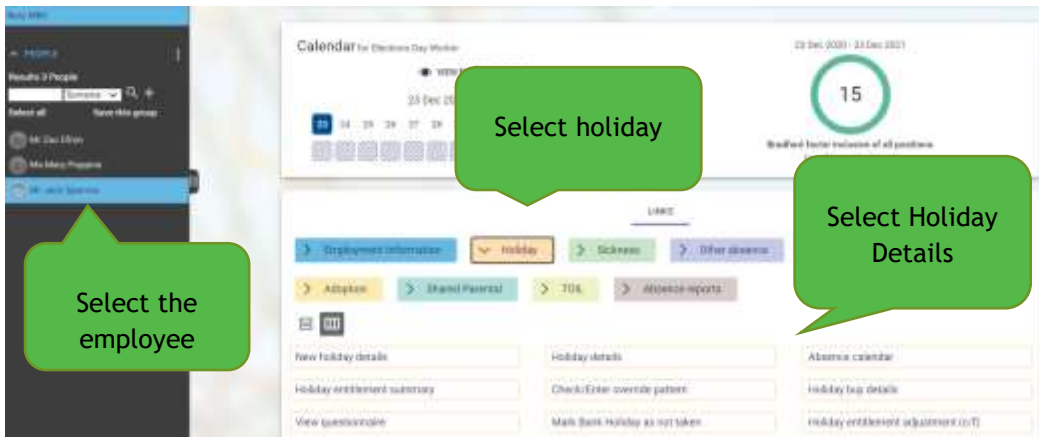
Please note:

The Start and End Times of a Part Day request are for information only. It is the Hours absent which deduct from the entitlement, and it must be entered in hours and minutes HH:MM (e.g. 02:30) if this field is blank no hours will be deducted.



HOW TO - AMEND / DELETE ANNUAL LEAVE

An employee can amend or delete their Annual Leave booking if it is in the future and the Manager will receive an email to advise them. An employee is not able to amend or delete an Annual Leave request once the start date has past. If they wish to cancel or amend an Annual Leave request after the start date has past they need to ask their Manager to do so.



The screenshot shows the iRent system interface for managing holiday absences. On the left, a sidebar lists dates under 'HOLIDAY ABSENCE LIST', with '06/04/2021' highlighted. A green callout bubble points to this date with the text: "Select the holiday to amend or delete". The main area displays 'Holiday absence details' for 'Mr Jack Sparrow'. Fields include 'Holiday period' (More than one day), 'Holiday start date' (06/04/2021), 'Holiday start type' (Full day), 'Holiday end date' (12/04/2021), and 'Holiday end type' (Full day). The 'Absence' section shows 'Absence type' (Annual Leave), 'Authorization' (Not applicable), and 'Position' (Accommodation Co-ordinator (06/04/2021) (Current)). At the bottom, there are 'SAVE', 'DELETE', and 'NEW' buttons. A green callout bubble points to the 'SAVE' and 'DELETE' buttons with the text: "Amend fields and SAVE" and "Or Select Delete to permanently remove the record".

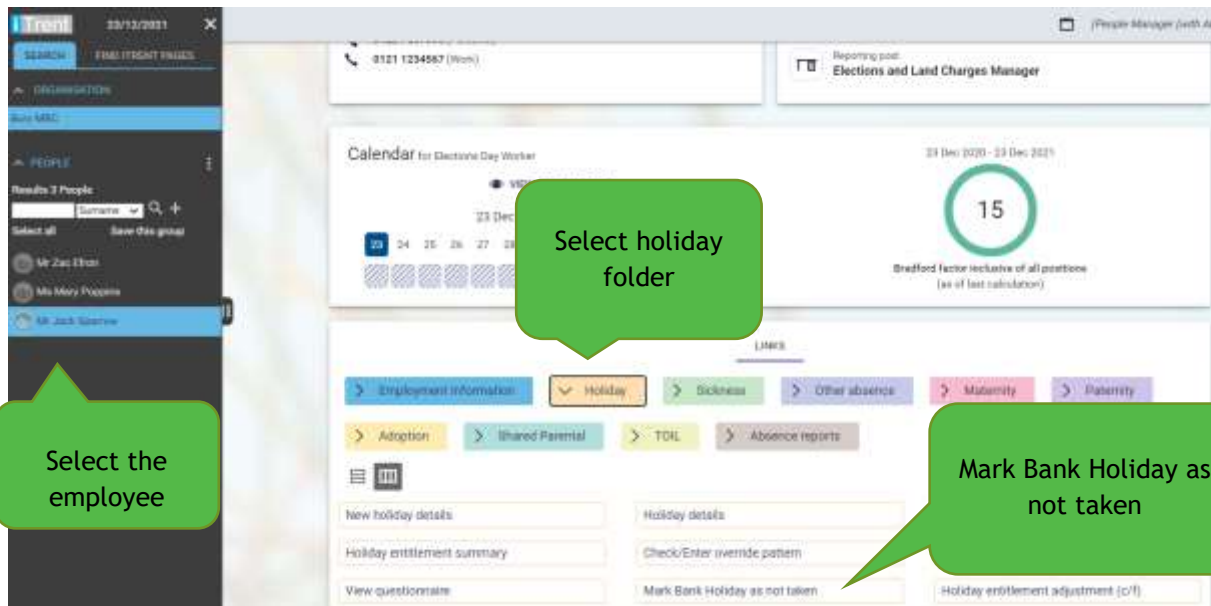
HOW TO - MARK BANK HOLIDAY AS NOT TAKEN

The Bank Holiday entitlement and floating day (if applicable) are added to the annual leave entitlement. The number of bank holidays are based on the number of bank holidays that fall during the period the employee is in the scheme.

The dates for each Bank Holiday are pre-loaded and reduce from the balance based on the hours on the employees work pattern therefore employees do not need to book bank holidays.

If an employee works a bank holiday, you will need to record the day as 'not taken' and the hours will be re-credited to the leave entitlement for the employee to take at another time. As the system auto deducts until the end of the leave year, you will also need to record the bank holidays after a person's leaving date as not taken so that the balance reflects their entitlement or wait for the actual leaving date to be entered to reflect the actual balance remaining.

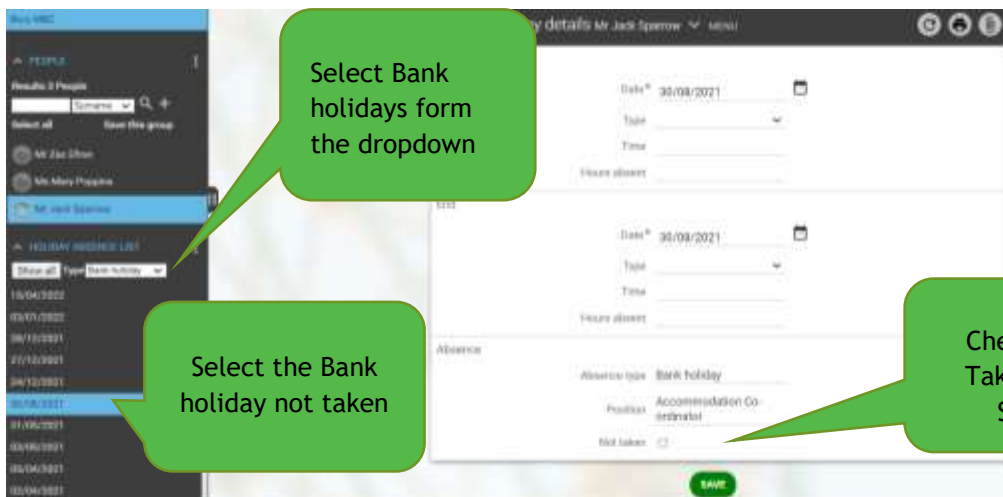
In the case where employees may work a bank holiday the Bank Holiday needs to be marked as not taken to allow for the hours to be credited to the employee balance for them to take at another time. An employee does not have the access to do this.



Select the employee

Select holiday folder

Mark Bank Holiday as not taken



Select Bank holidays from the dropdown

Select the Bank holiday not taken

Check Not Taken and SAVE

If the employee took part day off on the bank holiday the hours lost can be amended via Pattern Override

HOW TO – AUTHORISE ANNUAL LEAVE

When an employee requests Annual Leave via ESS, an automated email will be sent to notify you. Log into iTrent, navigate to your 'To do list' and view your tasks.

Prior to authorising you can view the team members absence either on the Leave calendar (*for ease, open a new view*)



Select the To Do List Folder

Select the task to open the absence details



Holiday absence details Ms Mary Poppins

Holiday period

Holiday start

Holiday end

Absence

Click menu to check the team calendar before approving or the pattern override to amend the hours lost

Enter username and password and select approve or reject, enter notes if rejected & SAVE

User name: D-EDWARDS
 Password: [REDACTED]
 Authorisation status: Authorised
 Reason: [REDACTED]

| Holiday period | Entitlement | Taken | Scheduled | Balance |
|-------------------------|-------------|--------|-----------|---------|
| 01/04/2021 - 31/03/2022 | 148 H | 88.8 H | 133.2 H | -74 H |
| 01/04/2022 - 31/03/2023 | 148 H | 0 H | 37 H | 111 H |

| Holiday period | Entitlement | Taken | Scheduled | Balance |
|-------------------------|--------------------------|---------|-----------|---------|
| 01/04/2021 - 31/03/2022 | 384 H | 125.8 H | 155.4 H | 102.8 H |
| 01/04/2022 - 31/03/2023 | 392.2 H (inc: 74 bought) | 0 H | 111 H | 281.2 H |

HOW TO - VIEW PURCHASED LEAVE

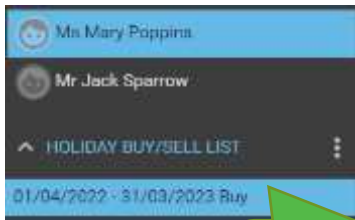
Employees can request purchased leave in the 3 months prior to the start of the leave year. The Manager will receive a task to approve the request and the authorisation process is the same as it is for annual leave.

Managers can only view not add purchased leave. If an employee wishes to delete purchased leave contact TrentHR.

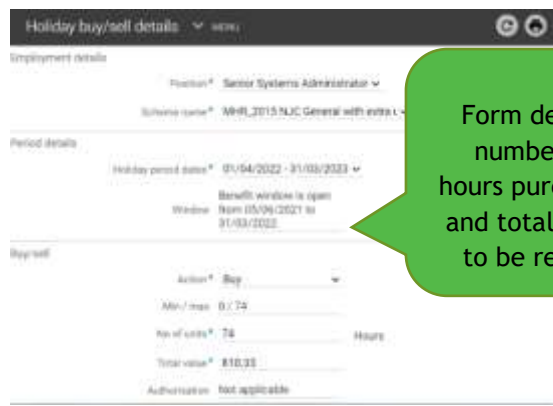
Select Holiday Folder



Select Holiday Buy form



Select Employee Name and Leave Year for the Holiday Buy Details to display

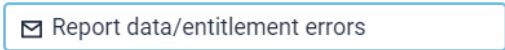


Form details number of hours purchased and total value to be repaid

HOW TO – CHECK AND OVERRIDE A WORKING PATTERN

The Work Pattern is critical for the correct deduction of hours for annual leave/bank holidays taken. Although managers may allow flexibility in working hours for the efficient management of the service, the working pattern worked most frequently should be held in iTrent to reduce the amount of manual override by a manager to correct working patterns for accurate deductions.

If the hours deducted are incorrect and this is due to a permanent change of work pattern then click on the email link 'Report data/entitlement errors' in the Employment Information section to report the error in the pattern, the date the change occurred and the new pattern details.



The changes need to be in the following format:

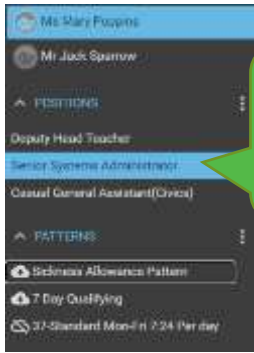
Total HH:MM: Mon HH:MM, Tues HH:MM Wed HH:MM, Thur HH:MM Fri HH:MM Sat HH:MM Sun HH:MM

If the employee works a more complex pattern, please submit to TrentHR@bury.gov.uk for set up in iTrent.

Check the working pattern in iTrent by navigating in the Absence Section to the Employment Information:



Select the person's position and the work pattern The following form will open:



Pattern details Working Pattern

Type: Working Pattern

Pattern: 37-Standard Mon-Fri 7:24 Per day

Start day: Week 1 / Day 1

Start date: 16/11/2020

End date:

Hours information:

Contractual hours: 37.00

Pattern days

Current day: Week 1 / Day 4

| | Mon | Tue | Wed | Thu | Fri | Sat | Sun | Total |
|--------|-------|-------|-------|-------|-------|-------|-------|-------|
| Week 1 | 07:24 | 07:24 | 07:24 | 07:24 | 07:24 | 00:00 | 00:00 | 37:00 |

Select position and pattern

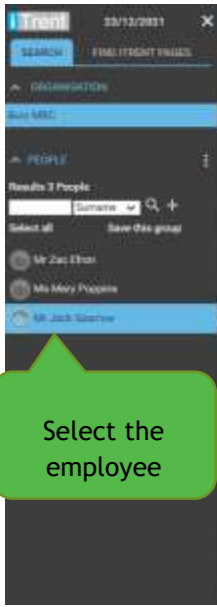
The Pattern days display in hours and minutes the standard pattern used for deduction of hours



Please note:

Working patterns are displayed in hours and minutes but contractual hours in decimals

If the deduction is incorrect due to a temporary change in work pattern the manager can amend the deduction with the link to Pattern Override. Managers can overtype the hours on a particular working day during an absence period and the total hours leave deducted for the period will amend to reflect the actual hours taken.



Calendar for Electronic Day Worker

23 Dec 2020 - 23 Dec 2021

15

Bradford factor includes of all postboxes (as of last calculation)

LINKS

Employment information | **Holiday** | Sickness | Other absence | Maternity | Paternity

Adoption | Shared Parental | TDIL | Absence reports

New holiday details | Holiday details

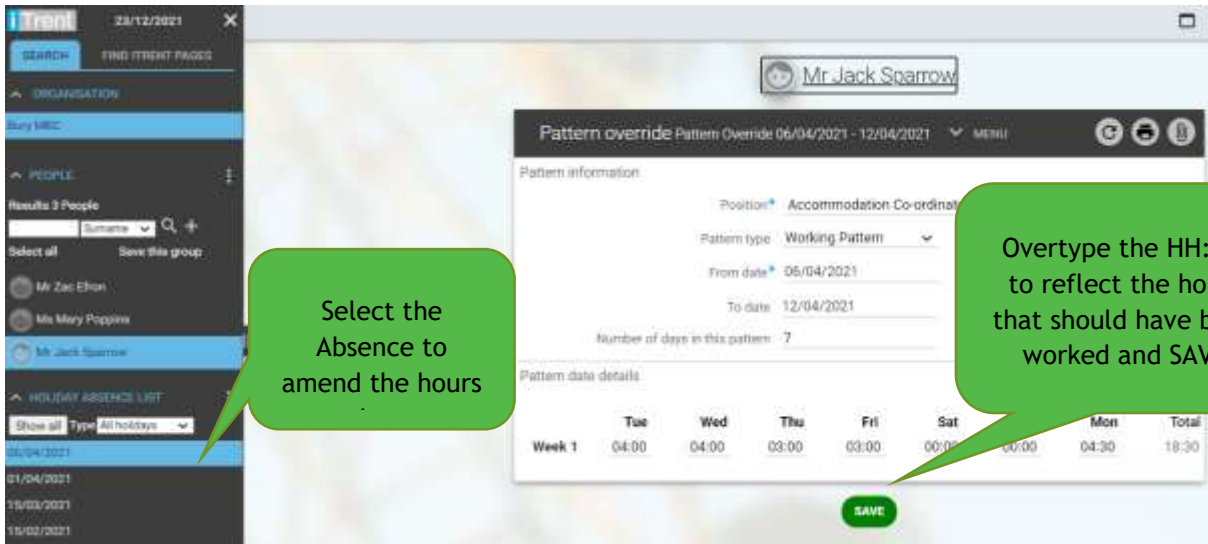
Holiday entitlement summary | Check/Enter override pattern

View questionnaire | Mark Bank Holiday as not taken

Select the employee

Select holiday folder

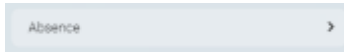
Select Check/Enter override pattern



HOW TO – MANUALLY ENTER A CARRY FORWARD

This form displays the leave entitlement and any adjustments, for example any carry over leave from the previous year or the deletion of a day's leave.

Navigate to the Absence section:



Select Absence

Select the employee, Holiday Folder, and select the link to Holiday Entitlement Summary

Select Holiday Folder



Select Holiday entitlement adjustment form

The Holiday entitlement adjustment form will open and display the Scheme name & entitlement and any Adjustment Type, for example:

To enter any annual leave carried forward from the previous leave year amend the adjustment type to Adjust.

When entering the leave carried forward in hours utilise the following 'Days to Hours Ready Reckoner'. NOTE: carry over of leave for part time employees is pro rata to the maximum stated in the policy.

| FTE HOURS | 0.5 DAY | 1.0 DAY | 1.5 DAYS | 2.0 DAYS | 2.5 DAYS | 3.0 DAYS | 3.5 DAYS | 4.0 DAYS | 4.5 DAYS | 5.0 DAYS |
|-----------|---------|---------|----------|----------|----------|----------|----------|----------|----------|----------|
| 37 | 3.7 | 7.4 | 11.1 | 14.8 | 18.5 | 22.2 | N/A | N/A | N/A | N/A |
| 37.5 | 3.75 | 7.5 | 11.25 | 15 | 18.75 | 22.5 | 26.25 | 30 | 33.75 | 37.5 |

HR will adjust the leave entitlement for those on long term sick or maternity, shared paternity or adoption leave when the employee returns to work.

Holiday entitlement adjustment ▼ MENU

Employment details
Position HR Assistant (TEST) ▼

Period details
Holiday period dates 01/04/2021 - 31/03/2022 ▼
Scheme name MHR_2015 NJC General ▼
Entitlement for period 270.1 hours (360 hours Pro Rata)
Brought forward _____
forward not used (lost) _____

Adjustment details
Adjustment type Adjust ▼

| Date entered | User name | Value | Reason | End date | Entitlement | Add | Remove |
|--------------|-----------|-------|--------|-------------------|-------------|-----|--------|
| | | | | <u>31/03/2022</u> | | + | - |

SAVE

Annotations:
 - Enter in Hours the c/f reason (points to Brought forward field)
 - Select the holiday period to add the c/f hours (points to Holiday period dates dropdown)
 - End date based on the holiday period selected (points to End date field)

The value entered can be negative if the employee has exceeded their entitlement in the previous leave year.

Adjustment details

Adjustment type Adjust ▼

| Date entered | User name | Value | Reason | End date | Entitlement | Add | Remove |
|--------------|-----------|-------------|--------------------------|-------------------|-------------|-----|--------|
| | | <u>22.2</u> | <u>c/f holiday 20/21</u> | <u>31/03/2022</u> | | + | - |

SAVE

Annotation:
 - Save (points to the Save button)

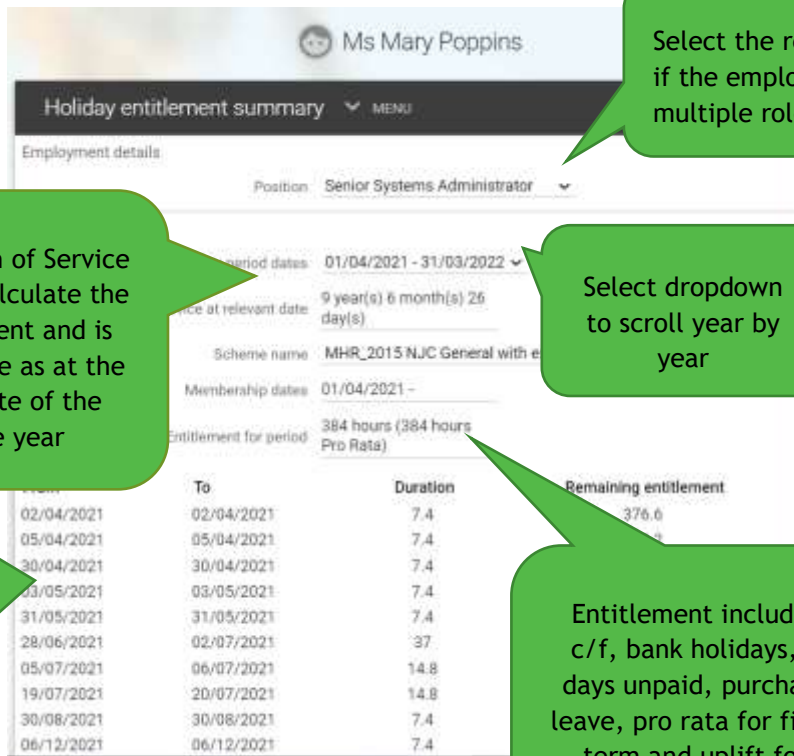
Adjustment details

Adjustment type Adjust ▼

| Date entered | User name | Value | Reason | End date | Entitlement | Add | Remove |
|-------------------|------------------|---------------|--------------------------|-------------------|--------------------|-----|--------|
| <u>22/12/2021</u> | <u>D-EDWARDS</u> | <u>22.200</u> | <u>c/f holiday 20/21</u> | <u>31/03/2022</u> | <u>292.3 hours</u> | + | - |
| | | | | <u>31/03/2022</u> | | + | - |

SAVE

Annotations:
 - Date and user auto populates (points to Date entered and User name fields)
 - New total entitlement displays (points to Entitlement field)



Select the relevant job if the employee has multiple roles

The length of Service used to calculate the entitlement and is the service as at the start date of the leave year

Select dropdown to scroll year by year

Dates of Annual Leave and Bank Holidays and deduction and entitlement

Entitlement includes c/f, bank holidays, 3 days unpaid, purchase leave, pro rata for fixed term and uplift for service in period

| From | To | Duration | Remaining entitlement |
|------------|------------|----------|-----------------------|
| 02/04/2021 | 02/04/2021 | 7.4 | 376.6 |
| 05/04/2021 | 05/04/2021 | 7.4 | |
| 30/04/2021 | 30/04/2021 | 7.4 | |
| 03/05/2021 | 03/05/2021 | 7.4 | |
| 31/05/2021 | 31/05/2021 | 7.4 | |
| 28/06/2021 | 02/07/2021 | 37 | |
| 05/07/2021 | 06/07/2021 | 14.8 | |
| 19/07/2021 | 20/07/2021 | 14.8 | |
| 30/08/2021 | 30/08/2021 | 7.4 | |
| 06/12/2021 | 06/12/2021 | 7.4 | |

NEGATIVE LEAVE BALANCE

iTrent does not allow the authorisation of a negative annual leave balance therefore you will not be able to authorise a leave request which takes an employee into a negative balance.

Managers should seek support from your HR Business Partner if this arrangement has been agreed in exceptional circumstances.

EXTERNAL STAFF

External Staff are not entitled to annual leave but for the purpose of recording days off for holiday in iTrent a scheme can be provided contact TrentHR Team.

HOW TO - VIEW FIXED TERM EXPECTED END OF OCCUPANCY

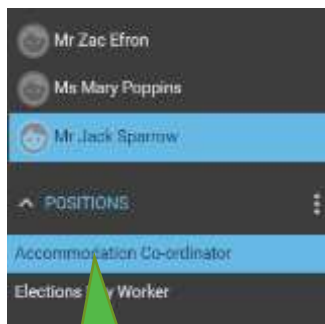
Employees in a Fixed Term role should have an annual leave entitlement including bank holidays pro rata to their expected occupancy end date.

Select Employment information folder

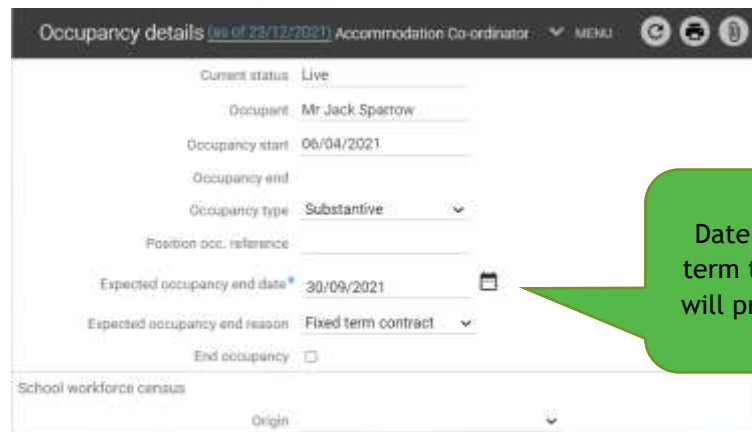


Select View Expected End Date

An alert will trigger to managers 45 days before the expected end date to work with their HRBP to terminate or extend the arrangement. The Annual Leave entitlement will auto correct with the amendment to the expected end date.



Select Reportee and position

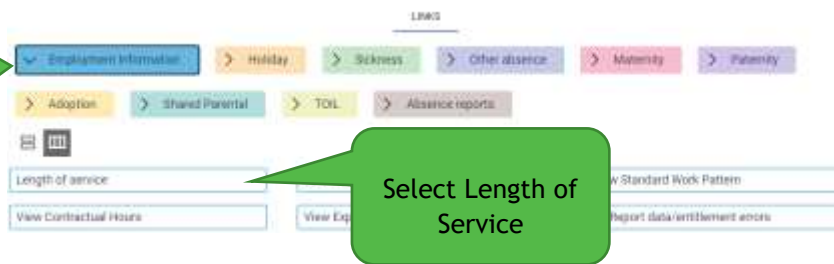


Date if Fixed term the leave will pro rata to

HOW TO – CHECK LENGTH OF SERVICE

The annual leave schemes have been set up to use the Reckonable Service Date on the Key Dates form, if this is blank the Organisational Start date is used. If dates are incorrect contact TransactionalHR.

Select Employment information folder



Select Length of Service

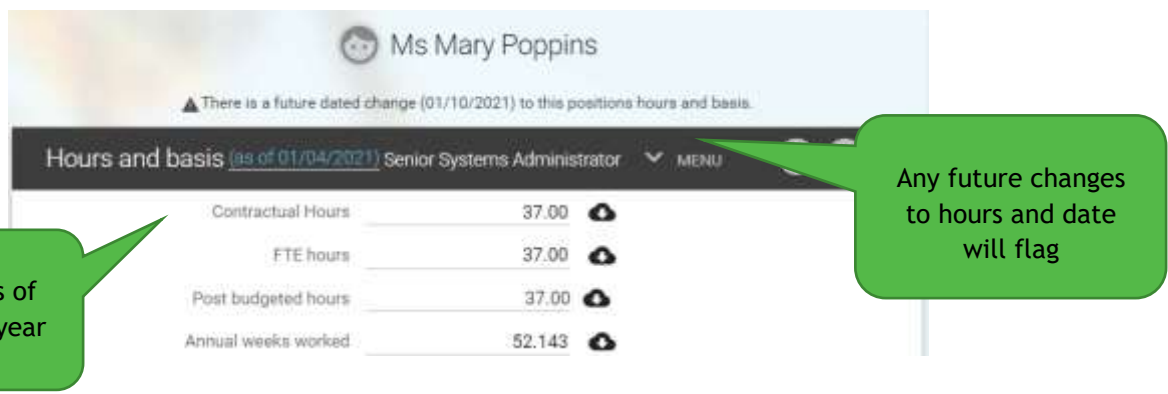
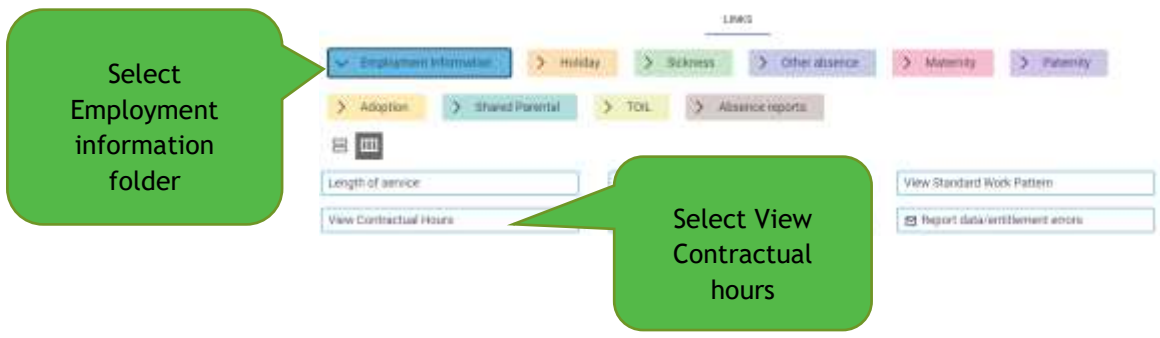
Annual leave uses Reckonable Service date unless blank



Annual leave uses Organisation Start date if Reckonable Service is blank

HOW TO – CHECK CONTRACTUAL HOURS

The annual leave entitlement is based on the contractual hours and if these change during the leave year the leave entitlement will be adjusted.



HOW TO – USE ABSENCE CALENDAR

The Leave calendar displays the absence and work patterns of employees and you can navigate directly from the calendar to the absence forms based on your security access:

You can display absences for:

- Month – centred on the effective date
- Quarter from today
- Month from today
- Specific date range
- This quarter
- This week
- Go back or go forward one month
- Go back or go forward three months

You can display the absences for:

All those in the reporting line – ‘Select all’
 An individual – Search and select
 Selected individuals – ‘Ctrl’ and highlight

From the Calendar you can take a shortcut to:

- Add a new Annual Leave request
- Update/delete an Annual Leave Request
- Override the Pattern

Absences of the team are displayed on the absence calendar and there are a number of routes to access the calendar.

From the home page the Manager can see all employees in their team out of the office, select the News Icon Out of Office



Select the image Out of Office to display the direct reporting team calendar



The Absence Calendar displays all absences with colour code. The user can based on their security access all absence forms from the calendar and create new and amend/delete absences, by selecting the absence.

From the Employee Summary Card click on the View Full Calendar to open the calendar for the specified employee

Mr Jack Sparrow

Personal
 Currently under absence review for Accommodation Co-ordinator
 Currently under absence review for Elections Day Worker
 Absence Improvement Action Plan (MHR) is due on 25/11/2021
 Well-being Plan (Stress Management) (MHR) is due on 25/11/2021
 Manual Handling Assessment Checklist (MHR) is due on 30/11/2021
 Known as **Jack**
 XG8024 (Payroll ref.)
 captjack@gmail.com (Personal)
 01234 567890 (Personal)
 0121 1234567 (Work)

Employment
 ELECTIONS DAY WORKER ACCOMMODATION CO-ORDINATOR
Elections Day Worker | TOWN HALL | Elections
 | Election Canvasser | Casual/Supply
 Occupancy started on 01/03/2016
 Reporting manager
Ms Diane Edwards
 External Managers Reporting only
 Reporting post
Elections and Land Charges Manager

Calendar for Elections Day Worker
 23 Dec 2021 - 05 Jan 2022
 23 24 25 26 27 28 29 30 31 01 02 03 04 05
 23 Dec 2020 - 23 Dec 2021
 15
 Bradford factor inclusive of all positions
 (as of last calculation)

CALENDAR PERIODS

The calendar periods under review can be amended from the date dropdown and the arrows.

You can display absences for:

- Month – centred on the effective date
- Specific date range
- Go back ◀ or go forward one month ▶
- Go back ◀◀ or go forward three ▶▶ months

Ms Mary Poppins + 1

Absence calendar
 23 Dec 2021 - 23 Jan 2022
 December Month from today
 Specific date range

Effective Date

Use arrows or dropdown option to display calendar view required

Legend:
 Bank holiday Company holiday Holiday Sickness Learning activity Other Maternity / Paternity
 Adoption TDIL Flexitime

Please click on a day for further options: [] = Awaiting authorization [] = on-site split [] = Cladding events

LEAVE CALENDAR - EMPLOYEE SELECTION

When you amend the employee selected the calendar will automatically refresh the calendar to those selected.



A blank People search displays all employees in your reporting line. Use **'Ctrl'** and **click** to select individuals to appear on the calendar or **'select all.'**

Click Select all to include all employees in the Calendar view

Ctrl and click to select specific employees to compare absences before approving annual leave

HOW TO ACCESS / AMEND ABSENCE FORMS FROM THE CALENDAR

All absence details and entitlement forms can be accessed from the calendar.

You can restrict to the position you are the manager for

Hold mouse over a date to display the position, absences, work patterns and reporting lines

Click on the calendar for the absence forms

Click on date with an annual leave booking and get option to Select Update/Delete Holiday

Holiday form opens with the start date auto populated

Holiday absence details New MENU

Holiday period
Holiday period* More than one day

Holiday start
Holiday start date* 10/01/2022
Holiday start type Full day

Holiday end
Holiday end date*
Holiday end type Full day

Absence
Absence type*
Authorisation

+ Holiday balances

HOW TO – RUN REPORTS

Within the Absence Reports section is the ability to run reports and display the absence history.

There are two Annual leave reports:

Holiday Entitlement Breakdown - This report shows how each employee's holiday entitlement for the year is made up, taking account of any brought forward from the previous year and manual adjustments made.

Outstanding Holiday Entitlement – details the entitlement, leave taken and remaining as at the date of the report

Absence History is a list of absences within a date range entered.

LINKS

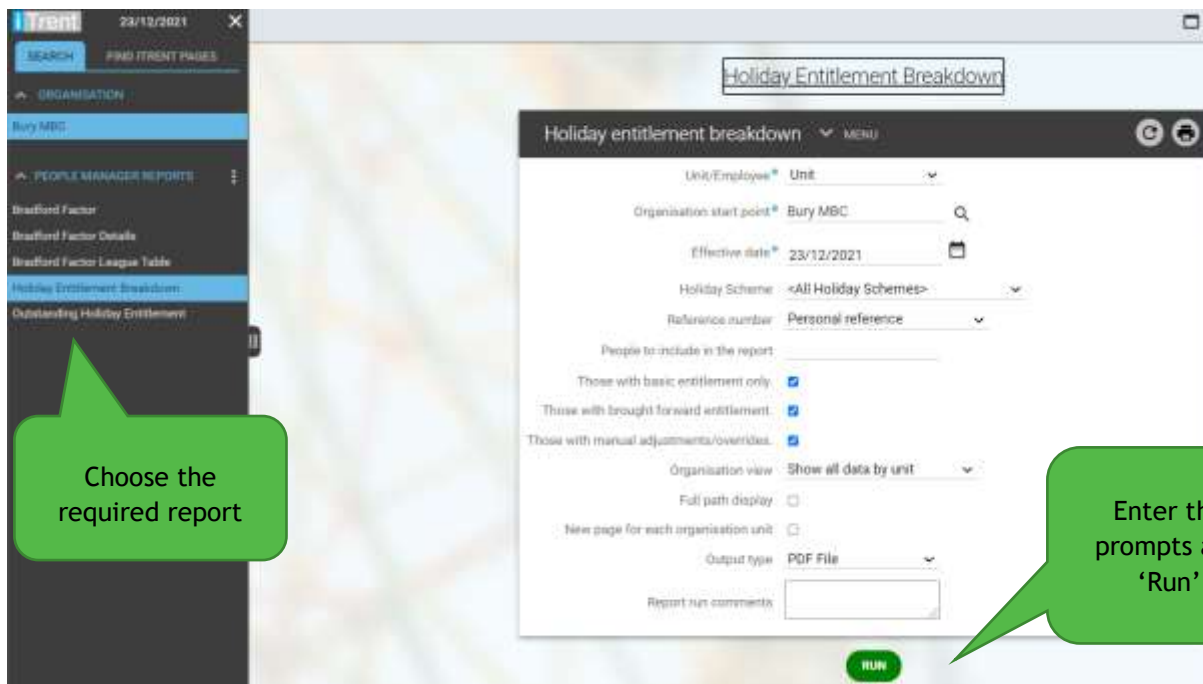
> Employment Information > Holiday > Sickness > Other absence >

> Adoption > Shared Parental > TOIL > Absence reports

Run absence report Download absence report Absence history

Select Absence reports folder

Select Run Absence Reports



A report can be output in PDF or Excel (CSV) format, and if run without selecting a specific employee in the Unit/Employee field it will run for all the reportees.

Report prompts:

| Prompt | Reports | Description |
|--------------------------|--|--|
| Unit/Employee | Holiday Entitlement Breakdown Outstanding Holiday Entitlement | Select to report on an organisation unit or a specific employee. <u>Unit</u> - If you 'Run' for the unit it will return All Reportees/employees in your access. <u>Employee</u> - If you 'Run' for an Employee you can search for required employee record |
| Organisation start point | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Accept the default value |
| Effective date | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Select a date in the leave year you require |
| Holiday Scheme | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Accept the default value |
| Reference Number | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Accept the default value |

| | | |
|-------------------------------------|---|--|
| People to include in the report | Holiday Entitlement Breakdown | <p>Tick for any of the 3 or all 3:</p> <ol style="list-style-type: none"> 1. Those with basic entitlement only - If selected then only basic entitlement will be included. 2. Those with brought forward entitlement - If selected then entitlements with holidays brought forward will be included. <p>Those with manual adjustments/overrides - If selected then entitlements with manual adjustments or overrides will be included.</p> |
| Minimum balance to report on days | Outstanding Holiday Entitlement | Enter the minimum number of holiday days to be included in the report |
| Minimum balance to report on hours | Outstanding Holiday Entitlement | Enter the minimum number of holiday hours to be included in the report |
| Organisation view | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Accept the default value |
| Full path display | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Ticking this box determines the format of the printed report hierarchy. |
| New page for each organisation unit | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | If selected each organisation unit will be displayed on a separate page |
| Output type | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Select the required output type from the drop down list. csv can be imported into Excel |
| Report run comments | Holiday Entitlement Breakdown and Outstanding Holiday Entitlement | Enter any comments to annotate the report |

EXAMPLE PDF REPORT:

iTrent Bury MBC

Holiday Entitlement Breakdown

Effective Date: 23/12/2021
Scheme: All Schemes
Employee Name: Poppins Mary
Organisational Start Point: Bury MBC
Organisation View: Full
Path Display: Partial
Reference No: Personal

| Scheme Name | Adjustment Reason | Unit | End of Holiday Yr | Basic Entitlement | B/F | B/F Lost | Adjustment | Override | Total Entitlement |
|---|-------------------|-------|-------------------|-------------------|------|----------|------------|----------|-------------------|
| Bury MBC (INTERIM) / Bury ACES | | | | | | | | | |
| Poppins Mary (Casual General Assistant(Civics); Reference Number: XC0633) | | | | | | | | | |
| MHR_Casual Holiday Booking | | Hours | 31/03/2022 | 30.00 | 0.00 | 0.00 | 0.00 | 0.00 | 30.00 |
| Bury MBC (INTERIM) / People Analytics | | | | | | | | | |
| Poppins Mary (Senior Systems Administrator; Reference Number: XC0633) | | | | | | | | | |
| Average Holiday entitlement 21/22 of 11.10 | | Hours | 31/03/2022 | 148.00 | 0.00 | 0.00 | 0.00 | 0.00 | 148.00 |
| Poppins Mary (Senior Systems Administrator; Reference Number: XC0633) | | | | | | | | | |
| MHR_2015 NJC General with extra entitlement 21/22 of 11.10 | | Hours | 31/03/2022 | 384.00 | 0.00 | 0.00 | 0.00 | 0.00 | 384.00 |

Example Pdf Report:

iTrent Bury MBC

Outstanding Holiday Entitlement

Effective Date: 23/12/2021
Scheme: All Schemes
For outstanding entitlements >>> 0.00 Days or 0.00 Hours
Employee Name: Sparrow Jack
Organisational Start Point: Bury MBC
Organisation View: Full
Path Display: Partial
Reference No: Personal

| Scheme Name | Unit | End of Holiday Yr | Entitlement | Taken | Scheduled | Outstanding |
|---|-------|-------------------|-------------|-------|-----------|-------------|
| Bury MBC / Accommodation Team | | | | | | |
| Sparrow Jack (Accommodation Co-ordinator; Reference Number: XG8024) | | | | | | |
| Average Holiday | Hours | 31/03/2022 | 74.00 | 23.00 | 0.00 | 51.00 |
| Sparrow Jack (Accommodation Co-ordinator; Reference Number: XG8024) | | | | | | |
| MHR_2015 NJC General | Hours | 31/03/2022 | 74.20 | 36.50 | 16.00 | 21.70 |

TO DOWNLOAD:

The screenshot shows the iTrent interface for downloading a report. On the left, a sidebar menu has a callout bubble pointing to 'Outstanding Holiday Entitlement' with the text 'Select the Report'. The main area shows the 'Holiday Entitlement Breakdown' report with a dropdown menu set to 'Today'. A callout bubble points to this dropdown with the text 'Choose period when report was run'. Below the dropdown is a table of report outputs with columns for 'Run date & time', 'Comments', 'Download', and 'Delete Select all'. A callout bubble points to the 'Download' column, which contains a download icon, with the text 'Select Download icon'. A 'DELETE' button is visible at the bottom of the interface.

It is important to delete unwanted reports from iTrent (to save space), however, they will automatically delete after 30 days as part of the housekeeping within iTrent.

VIEW FULL ABSENCE HISTORY

Absence history can provide a quick list of all absences within a defined start and end date. This list can only be printed and saved as a PDF.

Absence history MENU

Search period

Start date* 01/04/2021

End date 31/03/2022

Absence group Holiday

Absence type

SEARCH

Enter the date range and group and Search

Absence history LESS

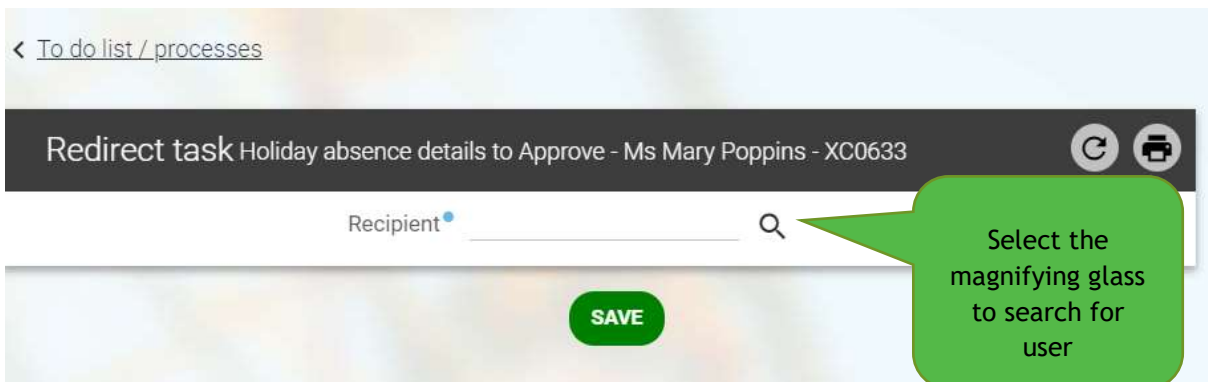
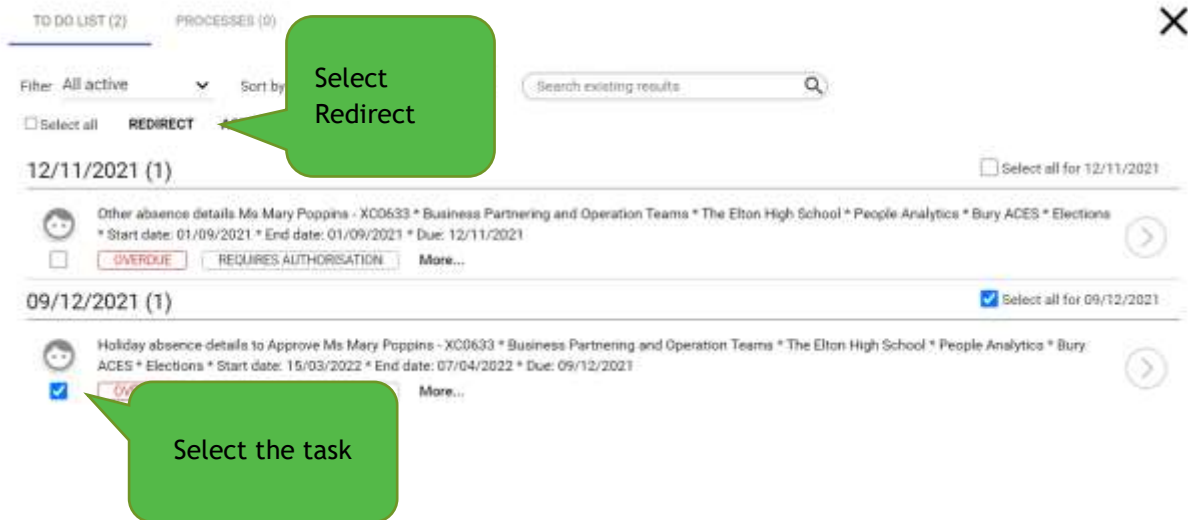
Run absence report Download absence report Absence history

| Personal ref. | Payroll no. | Person | Start date | End date | Type | Reason | Auth status | Unit | Job title | Working days lost |
|---------------|-------------|-----------------|------------|------------|--------------|--------|----------------|-----------------------|----------------------------------|-------------------|
| XC0633 | | Ms Mary Poppins | 30/04/2021 | 30/04/2021 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 14.8 |
| XC0633 | | Ms Mary Poppins | 28/06/2021 | 02/07/2021 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 7.4 |
| XC0633 | | Ms Mary Poppins | 05/07/2021 | 06/07/2021 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 29.6 |
| XC0633 | | Ms Mary Poppins | 19/07/2021 | 20/07/2021 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 29.6 |
| XC0633 | | Ms Mary Poppins | 15/11/2021 | 26/11/2021 | Annual Leave | | Not applicable | Bury ACES | Casual General Assistant(Civics) | 7.4 |
| XC0633 | | Ms Mary Poppins | 15/11/2021 | 26/11/2021 | Annual Leave | | Not applicable | The Elton High School | Deputy Head Teacher | 0 |
| XC0633 | | Ms Mary Poppins | 06/12/2021 | 06/12/2021 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 14.8 |
| XC0633 | | Ms Mary Poppins | 23/12/2021 | 04/01/2022 | Annual Leave | | Not applicable | People Analytics | Senior Systems Administrator | 88.8 |

HOW TO - REDIRECT TASKS FOR A SECOND AUTHORISATION

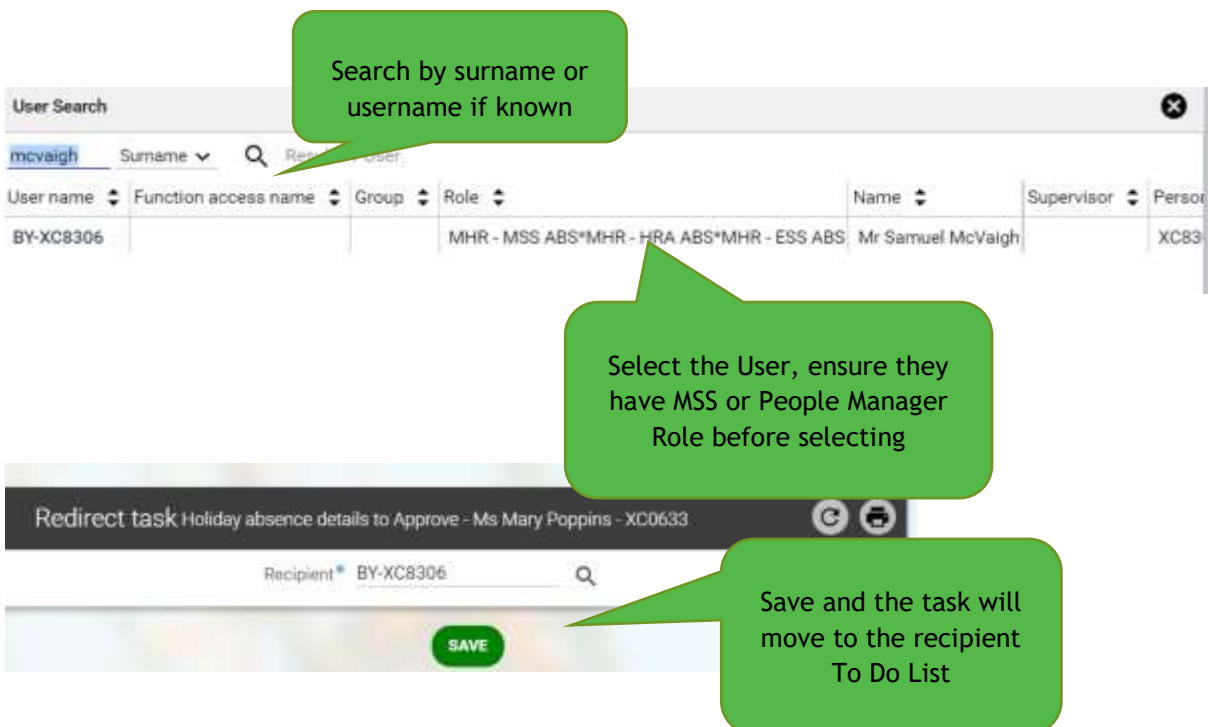
If an annual leave request requires a second authorisation for any reason, the recipient of the task can forward to another user with People Manager access. Do not redirect to a person that only has Employee Self Service access.





Ensure the users has an MSS role and scroll to ensure the correct name as there are over 10,000 records and there are users with the same surname on a search

If in any doubt ask for assistance from TrentHR





TIP:

Do not forward a task to a user that only has 'SELF SERVICE' - they will not be able to access the task and they will not get an email to notify them of the task

HOW TO - REDIRECT TASKS WHEN ABSENT

During absence, managers should redirect their tasks and emails to their manager as they will have access to the reportees.. Remember to change this when you return.

Tasks appear in your 'To do list' for you to review and take the appropriate action.

You cannot redirect to a person that only has Employee Self Service access because they do not have the appropriate access to take action on your behalf.

Select the iTrent Logo to return to the main menu:

Select Workflow Section

Select My Task Redirection form

Process Type is Redirect All

Enter the start and end date of the redirection

Search and select your manager to manage absences in your absence

Enter your password for iTrent and SAVE

PLEASE NOTE: If the User you redirect to subsequently redirects their tasks to you, then no tasks will be delivered but end up in a never ending cycle!

ROLES AND RESPONSIBILITIES

| Process | Who |
|--|--|
| Annually pre-load the Bank Holidays for next year | TrentHR@bury.gov.uk |
| Annually record the number of bank holidays for next year | TrentHR@bury.gov.uk |
| New Starters are attached an Annual Leave scheme | hrtransactionalservices@bury.gov.uk |
| Employees on Fixed-Term are attached a Rate Code for the pro-rata of annual leave based on their Expected Occupancy End Date | hrtransactionalservices@bury.gov.uk |
| Review employees Reckonable Service and take action if required. | Manager |
| Change employee's Annual Leave Scheme | hrtransactionalservices@bury.gov.uk |
| Permanent Change to Work pattern | hrtransactionalservices@bury.gov.uk |
| Enter Carry Forward from 2021/22 to 2022/23 | Manager |
| Delete Annual Leave (future date) | Employee or Manager |
| Delete Annual Leave prior to 'Today' | Manager |
| Record Bank Holiday as not taken | Manager |
| Adjust Annual Leave entitlement | Manager |
| Run reports | Manager |
| Monitor: <ul style="list-style-type: none"> • Annual Leave Entitlements • Annual Leave Taken • Remaining balances | Manager |