

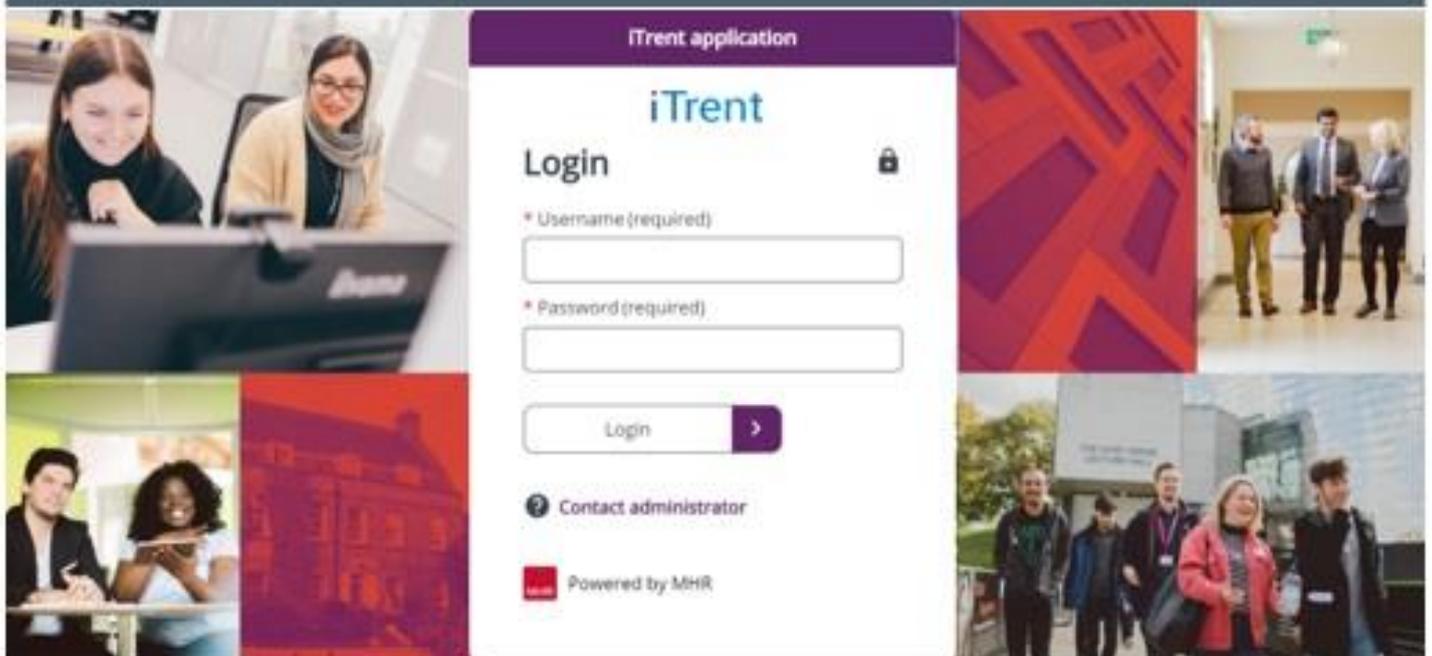


University of Essex

UECS
University of Essex Campus Services Limited

People Manager

User Guide



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Introduction

What is People Manager

People Manager is a tool that allows reporting managers and administrators with selected access to manage staff leave, view sickness records online and view reportees' 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

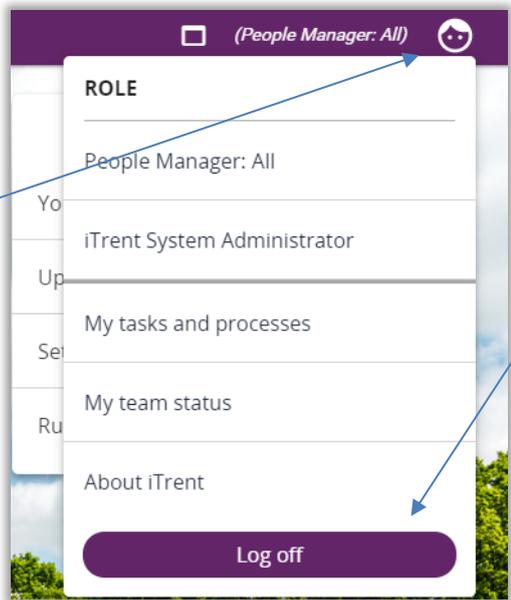
People Manager will only give you access to information related to staff who report to you. It is essential that you follow the [University's Data Protection Policy](#) and [Staff Privacy Policy](#) – please take the time to read these for a reminder of your responsibilities.

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 '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.



Log off

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.

Navigating People Manager

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.

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

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. If you have multiple iTrent roles then choose 'People Manager' from the dropdown list once you have logged in.

*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.

The screenshot shows the People Manager homepage with a purple header bar containing a 'MENU' icon and the user's role '(People Manager: All)'. A welcome message reads 'Good morning Erin, welcome back! You last logged in 2 minutes ago'. Below this is a 'reorder home page' button. The main content area features several widgets: 'User Guides' and 'Are you security aware?' (linked to 'Other useful information including news, policy, guides, and system updates'); 'My to do list (0) / Processes (0)' (linked to 'To Do List – this area will show tasks requiring action in your role as a People Manager; this is where you will authorise annual leave and other tasks'); 'Nobody is out of the office today' (linked to 'Will show anyone who is out of the office today. Click to view the absence calendar for all your reportees'); and a 'Links' sidebar on the right with items like 'Your reportees', 'Upcoming learning events', 'Set task redirection (out of office)', and 'Run a report'.

Other useful information including news, policy, guides, and system updates

Links

Good morning Erin, welcome back! You last logged in 2 minutes ago

reorder home page

User Guides

Are you security aware?

My to do list (0) / Processes (0)

Nobody is out of the office today

Your reportees

Upcoming learning events

Set task redirection (out of office)

Run a report

To Do List – this area will show tasks requiring action in your role as a People Manager; this is where you will authorise annual leave and other tasks

Will show anyone who is out of the office today. Click to view the absence calendar for all your reportees

Reportee Summary page

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

Click to return to the homepage

Employment Information

Select an employee

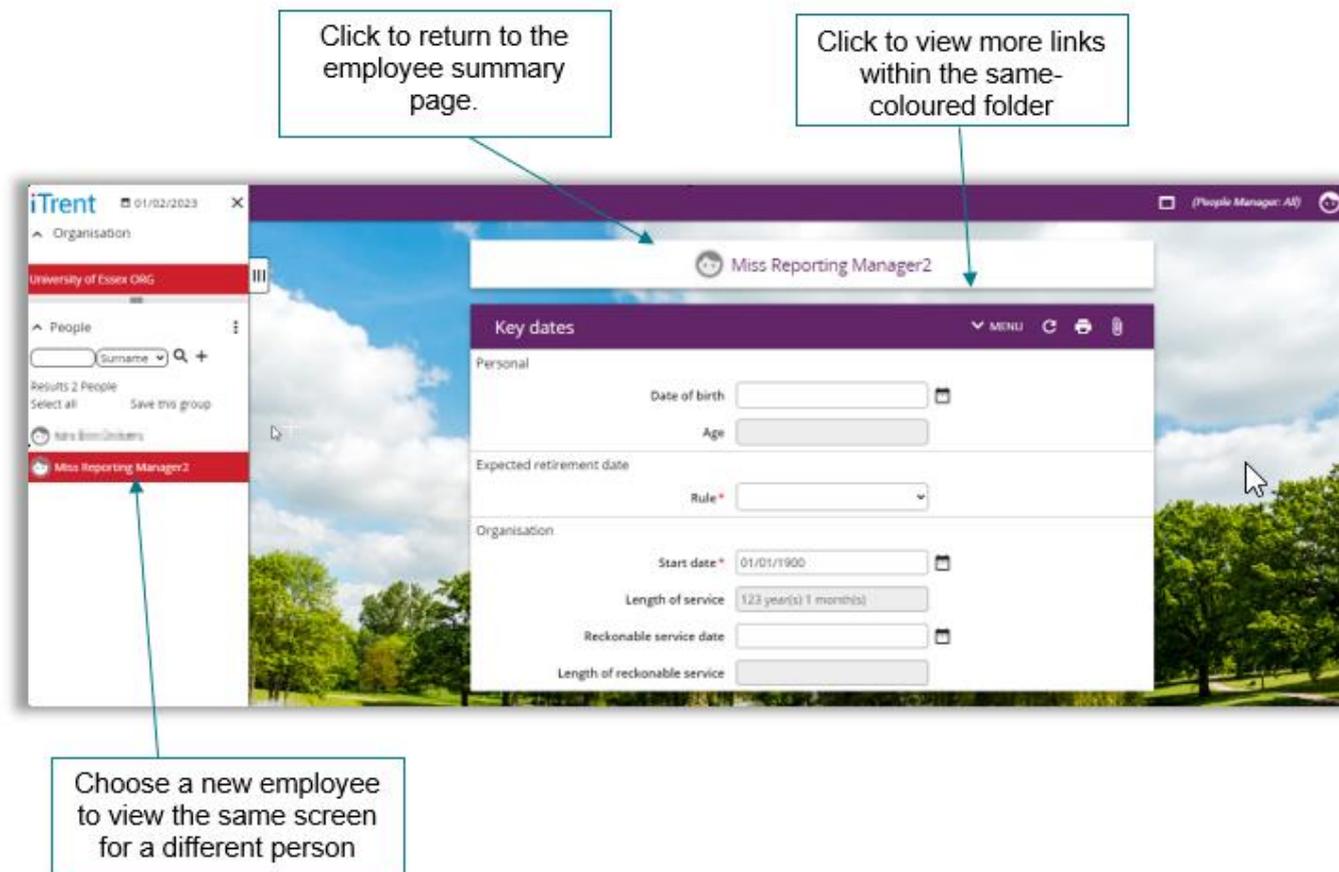
Links – Click on a coloured folder to expand the links relating to that area.

Annual leave remaining and sickness days taken

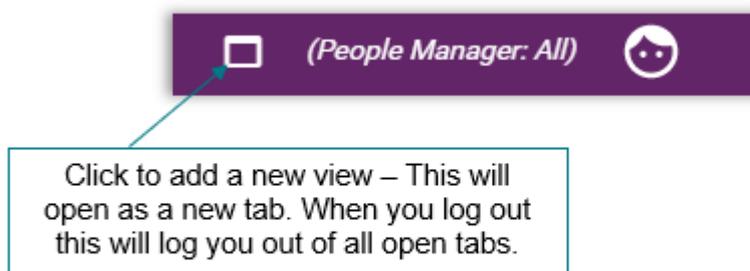
The screenshot displays the iTrent People Manager interface for a reportee named Miss Reporting Manager2. The interface is divided into several sections: a left-hand navigation pane, a top header, a main content area with 'Personal' and 'Employment' details, a 'Calendar' section, and a 'LINKS' section at the bottom. The 'Personal' section shows the employee's name and personal reference number. The 'Employment' section provides details on their reporting position, hours, and start date. The 'Calendar' section shows a view for February 2023 with a circular gauge indicating '0' days of sickness. The 'LINKS' section contains various colored folders for navigating to different areas like 'Personal information', 'Probation Processing', 'Employment information', 'Annual leave', 'Sickness', 'Other absence', 'Maternity/ Paternity', 'Absence Calendar', 'Timesheets', and 'Learning record'. Annotations with arrows point to these key elements.

Navigating between pages

When in a page you can access more links within that section by clicking on 'Menu' or on the person's name to return to the summary page.

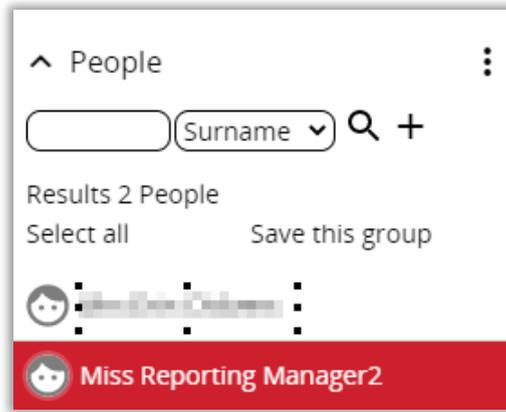


Adding a 'New View'



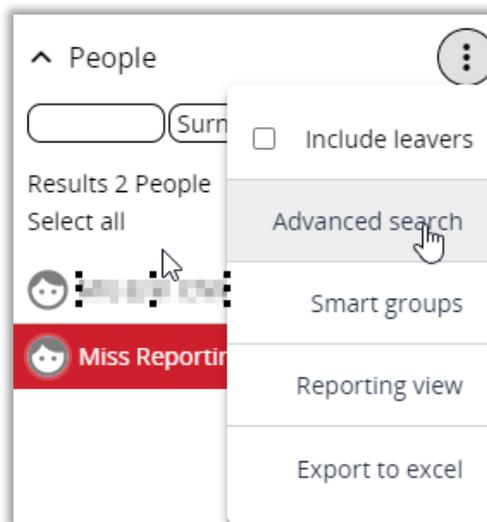
Team structure

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 reportees reporting to you, you may wish to use do a **People Search** to filter out some of the results. You can search for a specific reportee 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, tick the **Include leavers** 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 who 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 return any reportees 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.

Advanced search

Information

Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.

Criteria

Times sick in the last 3 r is greater than 1

Build special criteria

You can also choose to export the results to Excel; this will open up a new Excel document.

Advanced search

Information

Using the conditions CONTAINS, DOES NOT CONTAIN and IS NOT may result in the search taking a long time.

Criteria

Times sick in the last 3 r is greater than 1

Build special criteria

Generate batch

Save as smart group

For Trent For export Format MS Excel (data)

Display search criteria

Specify fields

Search Export Clear

	A	B	C	D	E	F	G	H	I	J	K
1	Include leavers Results 7 People										
2											
3	Select all										
4	Name	Unit	Job title	Sex	Date of birth	Social security no.	Personal ref.	Leaver	Position reference	Position occupancy reference	Payroll
5		School of Biological Sciences	Laboratory Technician	Female				40	00100FI	8001418AA	University of Essex Monthly Payroll
6		UECS - Operations	Business Development Manager	Male				No	0010AIX	26316102A	Essex Campus Services Ltd
7		Estate Management - Maintenance	Maintenance Assistant (Mechanical)	Male				No	1020BFC	27454292A	University of Essex Monthly Payroll
8		Academic Section - Southend Campus	Student Administration Assistant	Female				No	0010PAI	27216512D	University of Essex Monthly Payroll
9		Accommodation Essex	Administration and Systems Manager	Female				No	1035UR	27709322E	University of Essex Monthly Payroll
10		Estate Management - Cleaning: Postal staff and Grounds	Cleaner	Female				No	0010NIH	40037044C	University of Essex Monthly Payroll
11		International Academy	Administrator	Female				No	0010GZJ	2806223AD	University of Essex Monthly Payroll
12											

Viewing Reportee 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 by the Human Resources section upon 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 period's 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's name, start date and expected end date if there is one.

Hours and contract type: this screen shows the contractual hours and FTE (full-time equivalent) 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 reportee's pay scale salary.

Position previous occupants: this screen shows previous occupants of a reportee'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 reportee's 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 reportee,

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 webpage.

Managing Absence

Holiday Entitlement/Balance

TUPE reportees on the old University of Essex terms and conditions:

For reportees on **grades 1-6** their length of service determines their annual leave entitlement. The basic allowance is 165.6 hours (23 days). If they have received 5 years' service, they are entitled to 172.8 hours (24 days). 7 years equates to 180.0 hours (25 days) and 12 years to 187.2 hours (26 days). This is pro-rated for part time reportees.

For reportees on **grades 7-11** they are entitled to 201.6 hours (28 days) of basic annual leave. Long service does not apply.

Reportees on University of Essex Campus Services terms and conditions:

For reportees on **bands A-E** 273.6 hours (36 days), **bands F-H** 288.8 hours (38 days), **band H (pre-November 2017 starter)** 296.4 hours (39 days) and **bands I-K** 296.4 hours (39 days).

Holiday entitlement summary

Employment details

Position Reporting Position 2

Period details

Holiday period dates 01/08/2022 - 31/07/2023

Length of service at relevant date 122 year(s) 7 month(s) 0 day(s)

Scheme name UoE - Annual Leave v3 (Ent + £

Membership dates 01/01/1900 -

Entitlement for period 324 hours (450 hours Pro Rata)
(36 brought forward)

From	To	Duration	Remaining entitlement
29/08/2022	29/08/2022	0	324
19/09/2022	19/09/2022	0	324
26/12/2022	26/12/2022	0	324
27/12/2022	27/12/2022	0	324
28/12/2022	28/12/2022	0	324
29/12/2022	29/12/2022	0	324
30/12/2022	30/12/2022	0	324
02/01/2023	02/01/2023	0	324
20/02/2023	24/02/2023	0	324
07/04/2023	07/04/2023	0	324
10/04/2023	10/04/2023	0	324

Total entitlement including bank holiday/closure days for the period

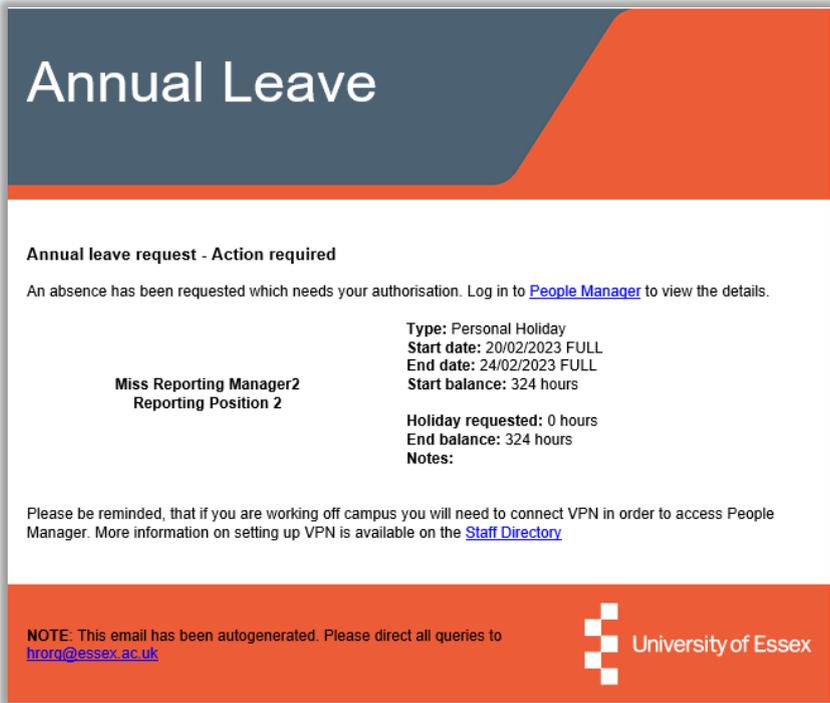
Change annual leave year using the drop down

Remaining annual leave balance available to book.

Annual leave and bank holiday dates

Authorising Annual Leave

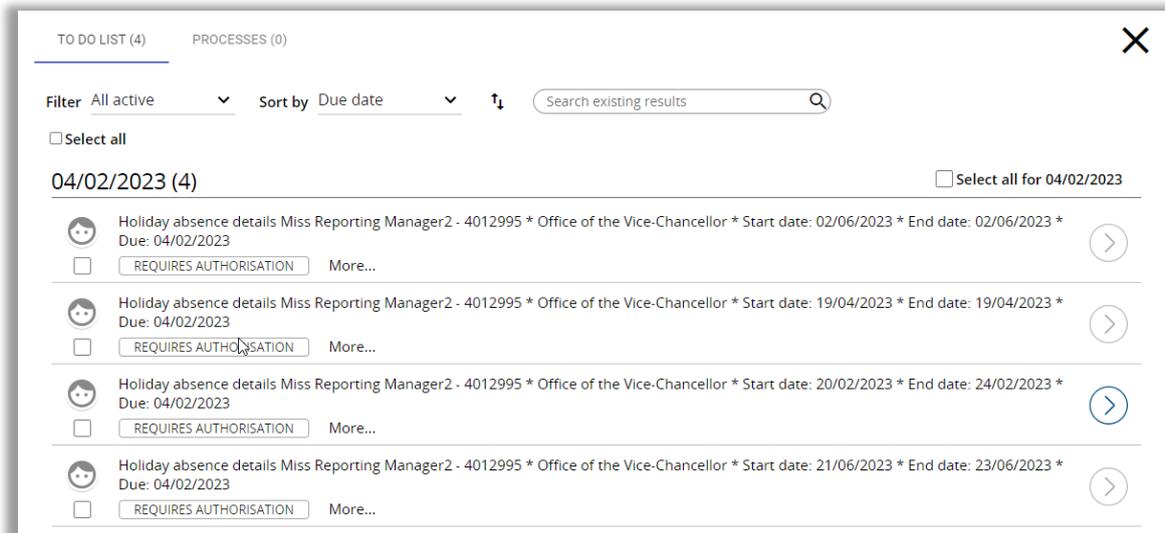
When a request for annual leave is submitted by an reportee through HR Organiser, you will receive an email request notification.



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.

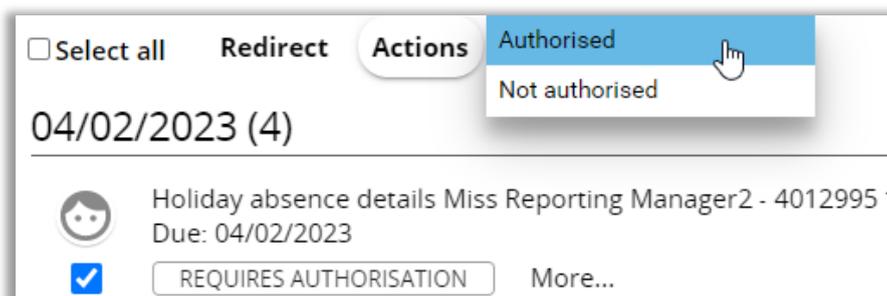
Remember you need your University username (without the @essex.ac.uk) and your University password. This is the same password you use to log on to the network. Refer to page 4 if you are having trouble logging in.

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

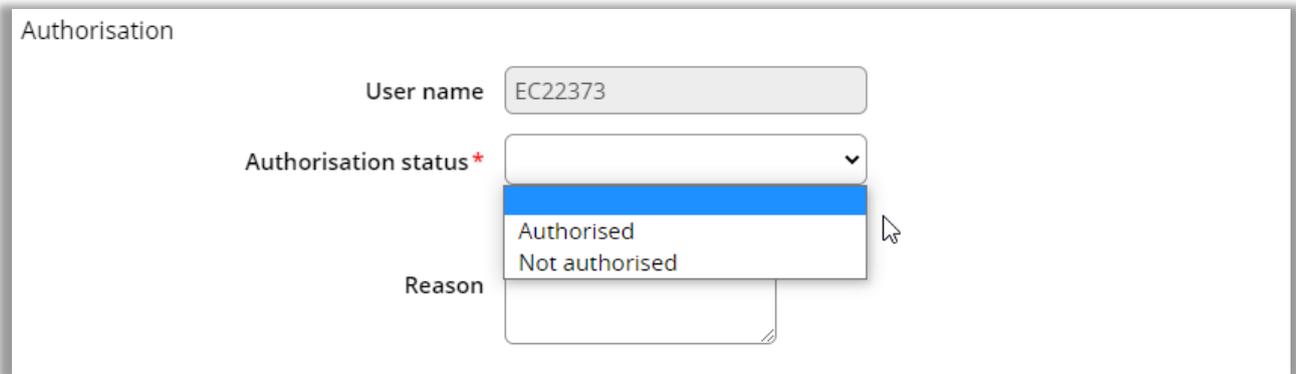


There are two ways you can authorise annual leave. Firstly, to action the tasks quickly, click on the tick box next to one or more items on the list. This will display an **Actions** button. Clicking on the button will bring up a dropdown menu giving you the options of **Authorised** or **Not Authorised**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

Caution should be taken when authorising multiple requests 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**. 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 dropdown menu to select **Authorised** and then press **Save**.



The screenshot shows a form titled "Authorisation". It contains three main fields: "User name" with the value "EC22373", "Authorisation status" with a dropdown menu, and "Reason" with an empty text area. The dropdown menu is open, showing two options: "Authorised" (highlighted in blue) and "Not authorised". A mouse cursor is pointing at the "Authorised" option.

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 Organisier. 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

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

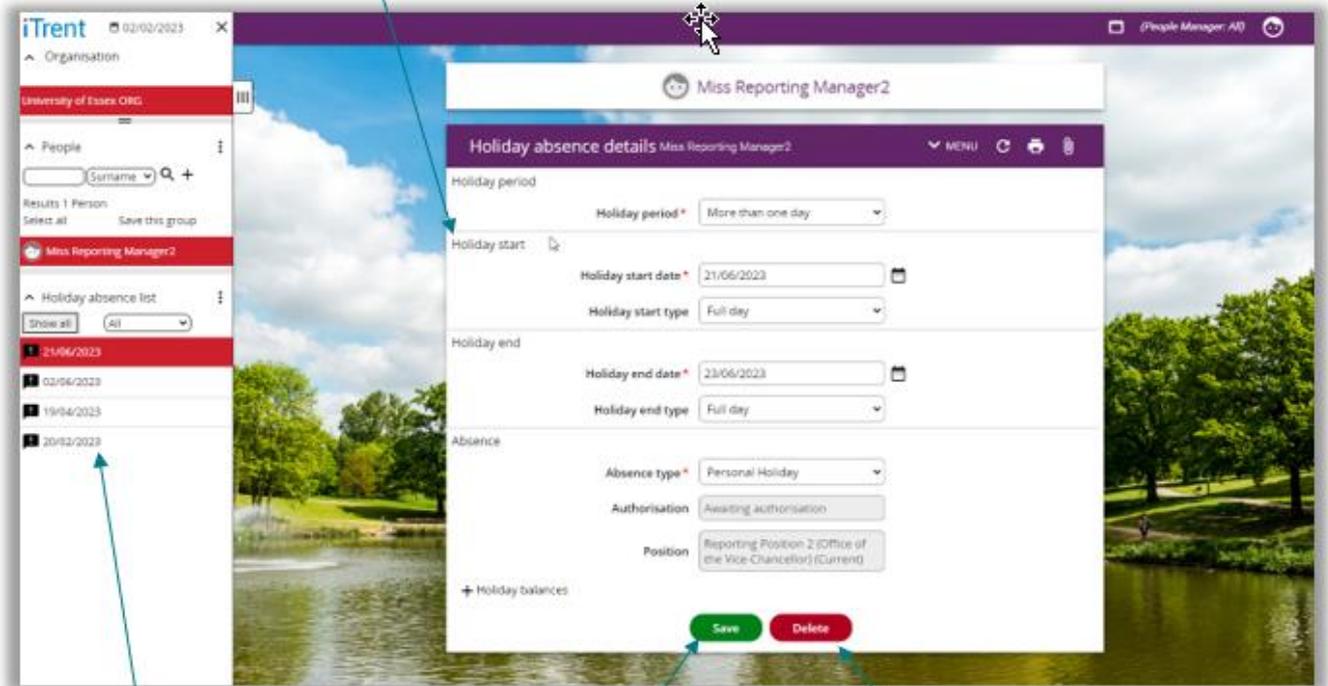
You can find this screen by opening the **Annual Leave** links folder and then selecting **View/amend holiday dates**. It shows details about the annual leave dates your reportee has booked, including those awaiting authorisation. This is the screen you get directed to when you click on a task in your **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 to/from dates or type (full day, part day, half day AM/PM) here



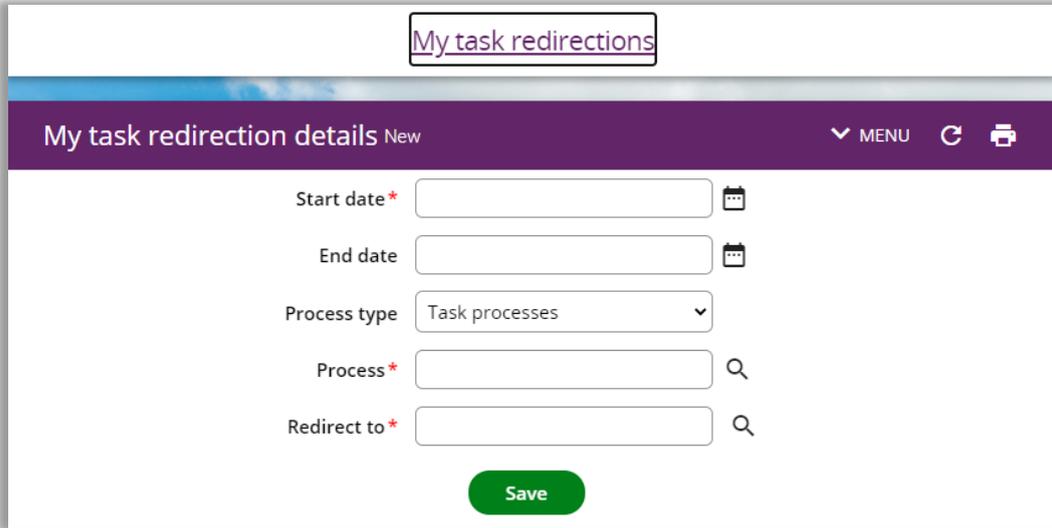
List of annual leave dates (including those awaiting approval)

Save to keep your changes

Delete to cancel the annual leave all together

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 redirection details" with a "New" indicator. The form includes the following fields and controls:

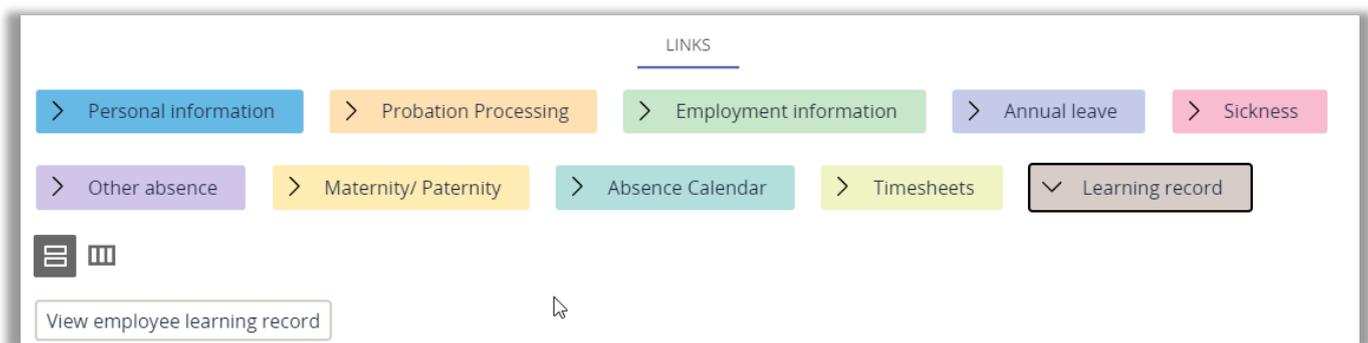
- Start date***: A text input field with a calendar icon.
- End date**: A text input field with a calendar icon.
- Process type**: A dropdown menu currently showing "Task processes".
- Process***: A text input field with a magnifying glass icon.
- Redirect to***: A text input field with a magnifying glass icon.
- Save**: A green button at the bottom center.

At the top of the form, there is a tab labeled "My task redirections".

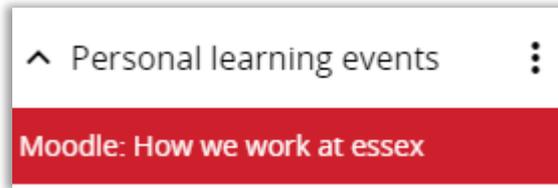
Managing Learning

Viewing information on reportees' learning activities

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, and 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

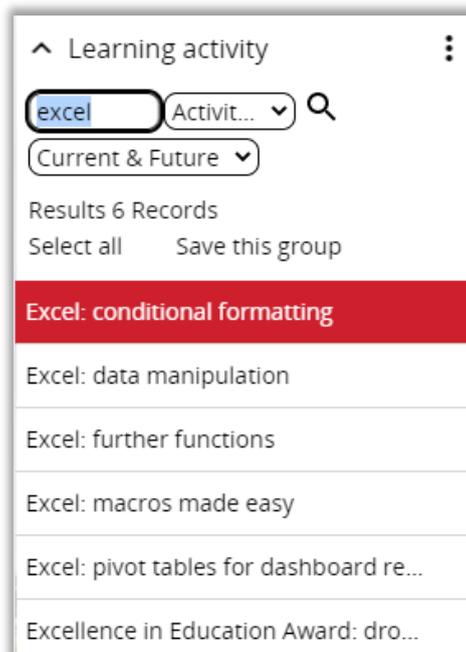
Learning hours

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 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 then be displayed on the right-hand side, in the display panel.

The screenshot shows a purple header with the text 'Learning activity overview Excel: conditional formatting'. On the right side of the header are icons for a menu, refresh, print, and a document icon. Below the header is a white box titled 'Overview' containing the following text:

IMPORTANT UPDATE
In response to COVID-19 this training is now being delivered remotely using Zoom. Please make sure you install Zoom prior to the training session. Visit the Zoom web page for instructions: <https://www.essex.ac.uk/staff/it-services/getting-started-with-zoom>.

PREPARATION FOR THE TRAINING
The Zoom link is: <https://essex-university.zoom.us/j/92161555447>
Task workbook: <https://essexuniversity.box.com/s/pzb3oc98lzbc634a1mbq20afj6ppoj7z>

This training is delivered on a Windows machine using the latest version of Excel from the Microsoft Office 365 suite.

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

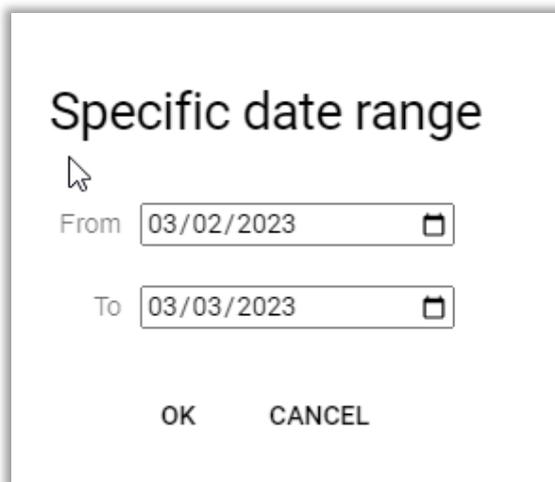
As a People Manager you can review absences within your responsibility. You can either view the absence calendar for one reportee by accessing the link under the **Reportee summary page** or for all your reportees by clicking the **Out of office today** box on the homepage.

The screenshot shows the 'Absence calendar' interface. At the top, it says 'Miss Reporting Manager2'. Below that is a purple header with 'Absence calendar' and navigation icons. The main area shows a calendar for February 2023, with a date range of '06 Feb - 31 Mar 2023'. The calendar grid shows various colored blocks representing absences for 'Miss Reporting Manager2'. A legend at the bottom identifies the colors: Bank holiday (green), Holiday (yellow), Sickness (red), Learning activity (blue), Other (orange), Maternity / Paternity (pink), and Adoption (purple). Below the legend, there are icons for 'Awaiting authorisation' (a star), 'am/pm split' (a box with a vertical line), and 'Clashing events' (a box with a lightning bolt).

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**.

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 at 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 a reportee 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 shown 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)

 = Awaiting authorisation  = am/pm split  = Clashing events

Yearly view

When a single reportee 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 (perhaps around monthly deadlines?) or absences relating to particular days of the week (e.g. Friday/Monday absences).

Sickness Absence information

Sickness Entitlement summary

This screen shows details of any sickness entitlement taken by a reportee, including details of the sickness scheme, entitlement to paid sickness absence, 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 Miss Reporting Manager2



Sickness period

Sickness period *

Absence start

Absence start date *

Absence start type

Absence end

Absence end date

Absence end type

Expected end date

Absence

Absence type *

Absence reason

Position

FAQs

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 Manger or HR Organiser.

“How secure is the information held in People Manager?”

The data in 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 reportees’ need to book the bank holidays off?”

Yes. Their holiday entitlement does include an allowance for bank holiday and closure days. They will need to be booked off in the same way as annual leave.

“Can my reportees’ book leave for next year?”

Yes, they need to book it in the normal way and it will automatically come out of next year’s allowance.

“I don’t think my reportee’s entitlement is correct?”

Please ask your reportee 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.

“Are anniversary year entitlements included in annual leave?”

Yes, please see the Holiday Entitlement Summary section. Extra days for UoE grades 1-6 will automatically be included at the beginning of the leave year that the anniversary falls.

“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 reportee and authorised by yourself. Carryover should never be more than 5 days. To add carryover to a reportee’s entitlement, please refer to the Input a Holiday Adjustment section.

“My reportee booked annual leave but actually ended up being off sick. What should I do?”

If the reportee didn’t actually take their annual leave, 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 reportee 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 reportee returns, but if you think it does not look correct, please contact the HR department who will be able to help you further.

“My reportee 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 reportee’s leave requests”

You will need to notify HR as there is 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 is 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 reportees’ 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 reportee 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 not automatically assigned to you. If you are a new manager, you will need to ensure you have notified us so we can give you the necessary access. The leave administrator for your department may have already made us aware of your arrival, so it is best to double check with them first.

“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.

Reportee information

“Why do some of my reportees’ 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 reportee’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.