
iTrent User Guide– Time and Expenses

Version	Date	Comments	Name
1.0	22/02/2022	Version 1.0	Lizzie Prosser-Higdon

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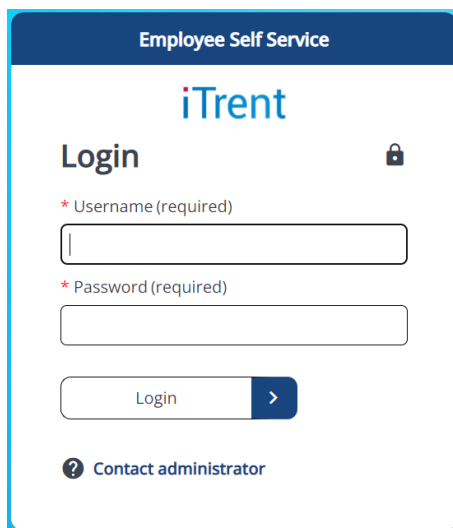
Background

This guide will cover claim for time and expenses in iTrent.

iTrent is the integrated Human Resources/Payroll software used by NCG to record employee data. All employees across the group will be given access to utilise Employee Self Service facilities. This enables employees to access (and update where appropriate) the information we hold for them. Where an employee does not have direct access to a computer, liaise with your line manager who will give support.

iTrent can be accessed via the NCG intranet <http://intranet.ncgrp.co.uk/SitePages/Home.aspx> and clicking the iTrent Self Service icon.

Once open type Username and Password into the appropriate boxes and click 'Login'.



The screenshot shows the 'Employee Self Service' login interface. At the top, there is a dark blue header with the text 'Employee Self Service'. Below this is the 'iTrent' logo. The main heading is 'Login' with a lock icon to its right. There are two input fields: the first is labeled '* Username (required)' and the second is labeled '* Password (required)'. Below the password field is a 'Login' button with a right-pointing arrow. At the bottom left, there is a link with a question mark icon labeled 'Contact administrator'.

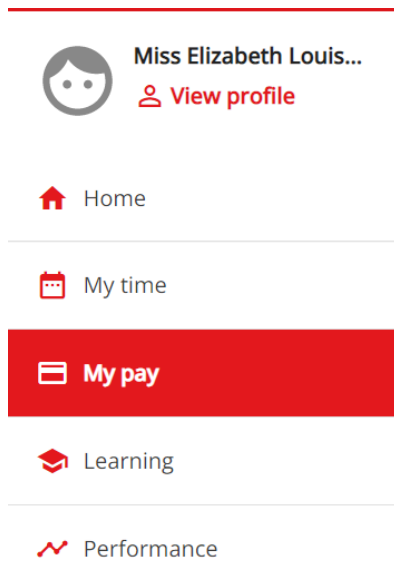
Note: Your credentials are the same as logging into your work PC

Expense and Timesheet claims require authorisation by the Line Manager and are subject to Payroll Deadlines.

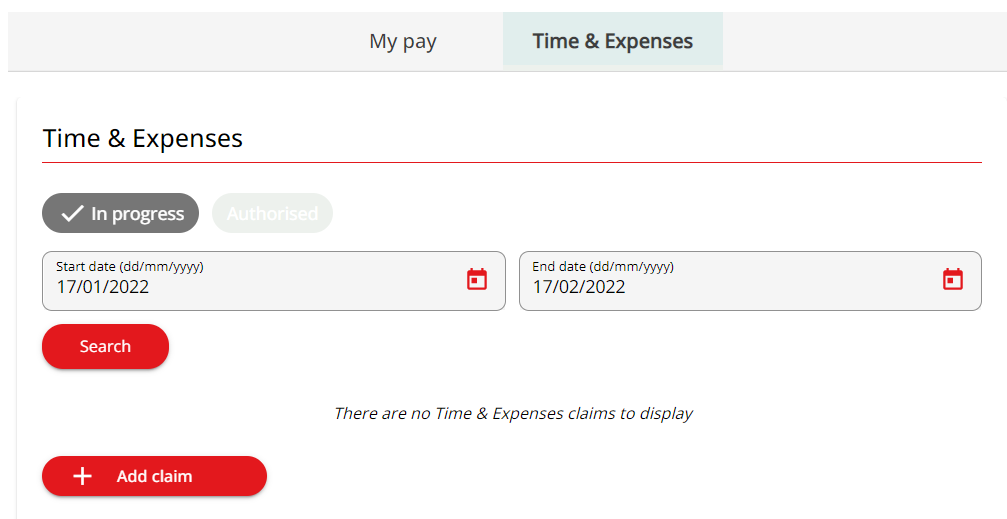
Expense and Timesheet claims are required to be input and authorised by the 21st of each month unless otherwise advised.

Claiming Expenses

To start the process, click on the 'Pay' option on the menu



Then select 'Time and Expenses'



Click on 'Add Claim' to start the process

Time & Expenses claim entry: New

[Job title details.](#)

Please make sure all claims are submitted and authorised by the 21st of the month for payment at the end of the month.

Thank-you

Start date (required)



Job title (required)

Claim template (required)


Next, enter the start date, select 'Business Expense Claim Form' from the 'Claim Template' dropdown

Once you have selected the correct claim template click on 'New'

Job title: Business Systems Trainer
Employee: Miss Elizabeth Louise Prosser-Higdon

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Expenses must be claimed in accordance with NCG Staff Travel & Subsistence Handbook which can be accessed via the link on the home page
I declare that the Expenses claimed below were reasonable and unavoidably incurred in the performance of my duties.
Relocation Expenses must only be claimed for following agreement from the appropriate Executive Lead.
Images of all receipts in support of this claim must be attached on the submission screen. This is in line with HMRC regulations.
Please enter the details of claimed Expenses using the relevant Expense type from the drop down list.

Element	Date	Details of Claim	Business Purpose for claim	Amount Claimed	
<input type="text"/>	<input type="text"/>			<input type="text" value="0.00"/>	+ -


Save draft Submit Print

On this page, select the 'Element' from the drop down and then enter the date you are claiming the expenses for. Then, in the Details of Claim describe what the item is, enter the 'Business Purpose for Claim' and then add the amount.

If you need to claim expenses for more than one thing, use the '+' button on the right to add a new line and enter the details for that expense. You can also remove a claim by clicking the '-' button.

Once you are done, click on 'Submit' to continue the process. If you want to come back to this at a later date click on 'Save draft'

On the next screen of the process, there will be a summary of the claim. Double check this information is correct and then enter your iTrent password.

 Changes have been saved.

Time & Expenses claim submission:

Claim template

Business Expenses Claim Form

Job title

Business Systems Trainer

Time and expenses claim reference

EX000001097

Payroll

Newcastle College

Start date

07/02/2022

Cut off date

21/02/2022 - This claim will normally be paid on 28/02/2022.

Comments

I certify the Expenses claimed were incurred wholly, exclusively and necessarily in the performance of my duties. All receipts have been attached to support my claim.


Password

+ Receipt attachments

You also must add a proof of purchase, to do this click on the '+' next to 'Receipt Attachments'

Receipt attachments

Attach receipt

No file chosen 

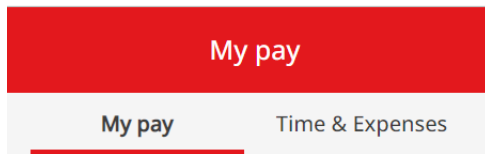
Click onto Choose File and select the relevant file from your PC files.

Note: Take a picture or scan the full receipt, ensure that the picture is clear and legible or your claim may not be authorised for payment.

When you have completed the above click 'Submit' to finalise your claim.

Claiming Hours

Start by going to Pay on the left-hand side menu. Then click 'Time and Expenses' at the top of the screen.



From here, click onto '+ Add Claim'

Time & Expenses claim entry: New

[Job title details.](#)

Please make sure all claims are submitted and authorised by the 21st of the month for payment at the end of the month.

Thank-you

Start date (required)

Job title (required)

Claim template (required)

Enter the start date as required and then change the 'Claim Template' dropdown to 'Hourly Pay Claims'

Time & Expenses claim entry: (New)

Job title: Business Systems Trainer
Employee: Miss Elizabeth Louise Prosser-Higdon

Page 1

Please enter the start date as the earliest date you wish to claim.
Claims should be entered and authorised on a weekly basis to ensure payment is made promptly.
Claims submitted and authorised by the 21st of the month will be paid at the end of that month.
If you are submitting a claim on, or close, to the 21st of the month you should check if your manager is available to authorise it.
If your claim is not submitted and authorised by the 21st of the month it will be paid at the end of the following month.
Hours worked should be entered as a decimal: e.g. for one and a half hours enter 1.50 and for one and a quarter hours enter 1.25.
To calculate a decimal from minutes you can use the [Decimal Calculator](#).

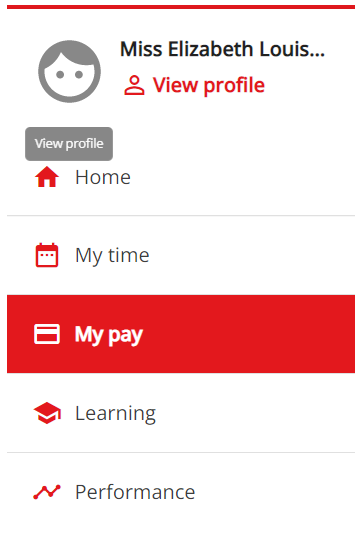
Element	Mon 14/02	Tue 15/02	Wed 16/02	Thu 17/02	Fri 18/02	Sat 19/02	Sun 20/02
Hours Worked		1					

[Save draft](#) [Submit](#) [Print](#)

On the next screen you can enter the hours you wish to claim for. Once you have entered everything that you need to click on 'Submit'. This will then be sent for authorisation.

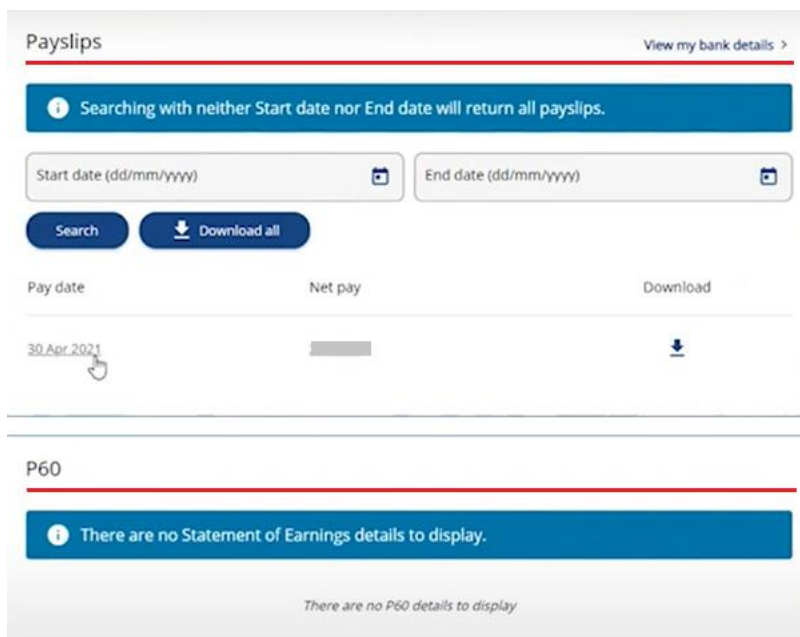
Accessing your Payslip

To access your payslips and P60 start by clicking on the 'My Pay' option from the menu.



On this screen, you can view a summary of all your payslips and P60s. You can choose to filter between certain dates or all payslips.

You will be able to see the pay dates and your net pay from here but if you wish to view your full payslip click on the arrow under download. Above the payslips there is an option to download all if needed.



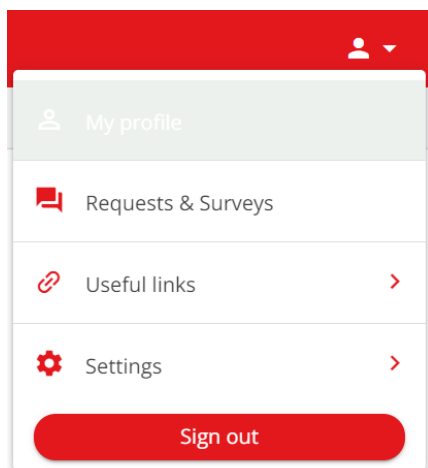
Request Payslips via Email

This setting only needs to be changed if you wish to receive your payslips via email each month. It is also recommended that you use your personal email address so you are able to access your payslips when you are not at work.

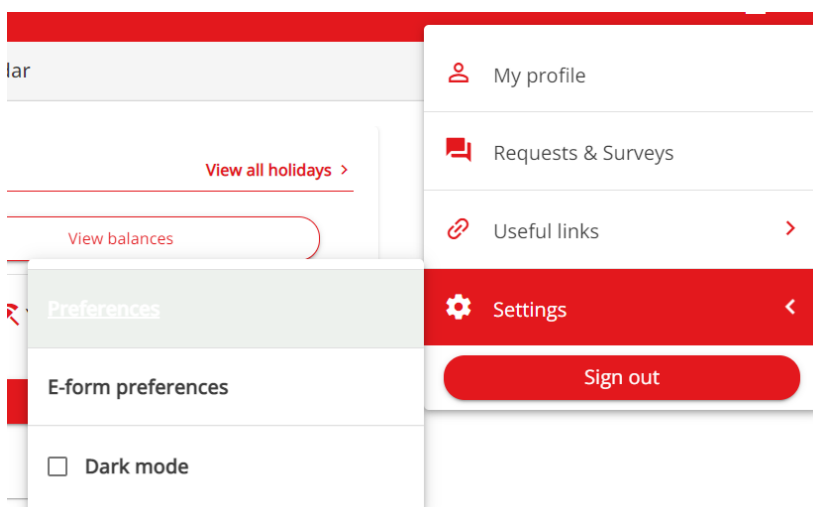
You can choose for your payslip and/or your P60 to be sent to your nominated email address. Both of which will be password protected with a password you input during this process.

From any page within iTrent on the top right-hand side of the screen there is an icon of a person.

Click onto this and an additional menu will open

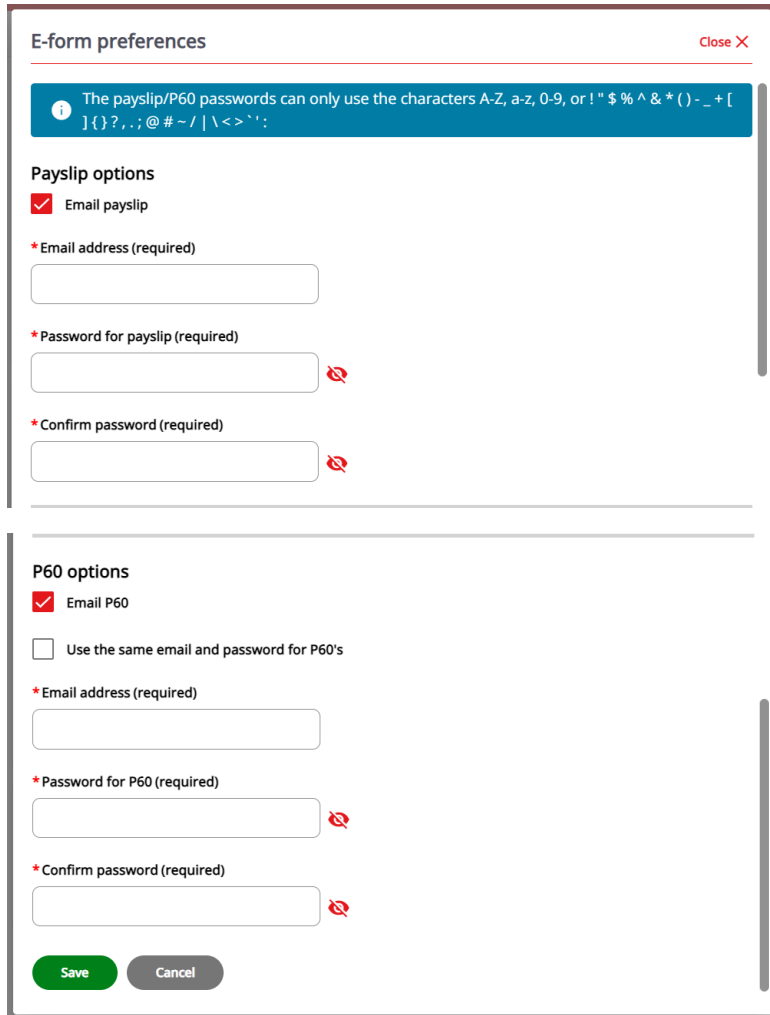


Click onto 'Settings' in this list and then onto 'E-form preferences'



This will open a short form to fill in. In the 'Email Address' field, enter the email that you wish to receive your payslips on.

Then set a password that will be used when you open the payslip from the email.



E-form preferences Close X

The payslip/P60 passwords can only use the characters A-Z, a-z, 0-9, or ! " \$ % ^ & * () - _ + [] { } ? , . ; @ # ~ / | \ < > ` ` :

Payslip options

Email payslip

*Email address (required)

*Password for payslip (required)

*Confirm password (required)

P60 options

Email P60

Use the same email and password for P60's

*Email address (required)

*Password for P60 (required)

*Confirm password (required)

Save **Cancel**

Choose whether you would also like receive your P60 via email and if so whether you want to use the same email/password.

Click on 'Save' to confirm the changes.

Please note: Payroll are unable to change this password. If you forget the password for your payslips please follow this process again and set a new password.