iTrent **User Guides**

iTrent User Guide People Manager

Updated 28/10/2022

iTrent Systems Administration
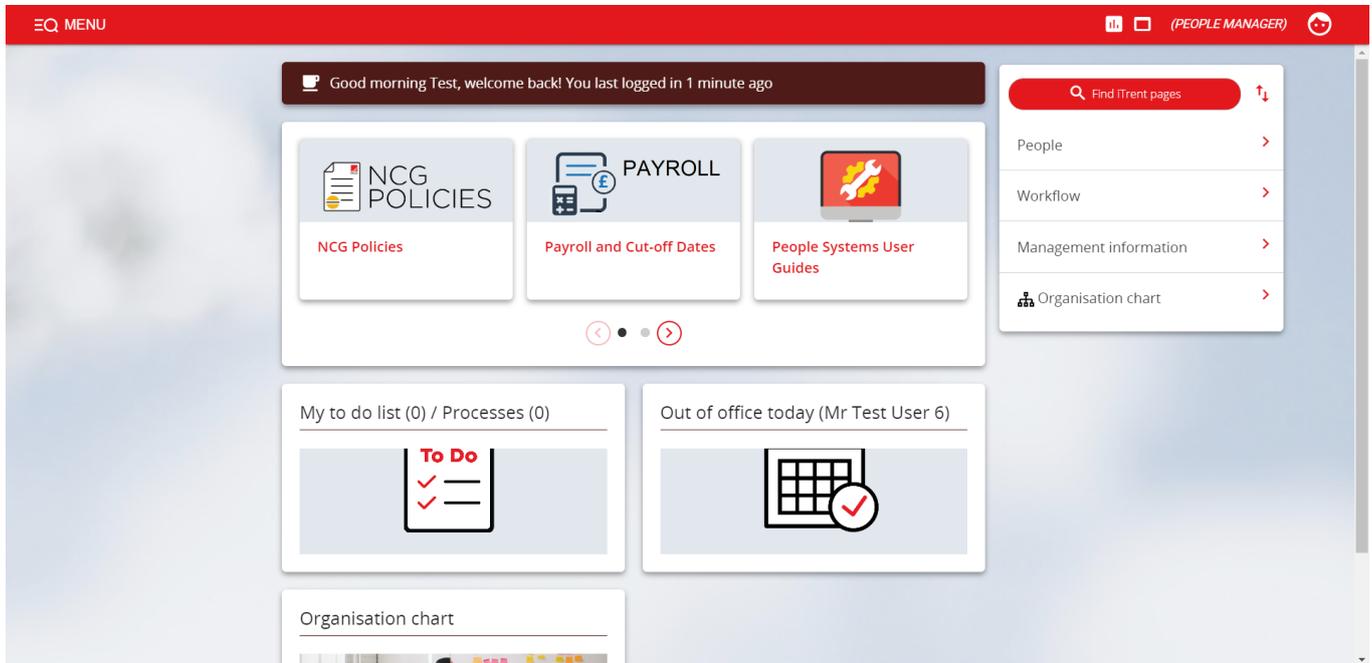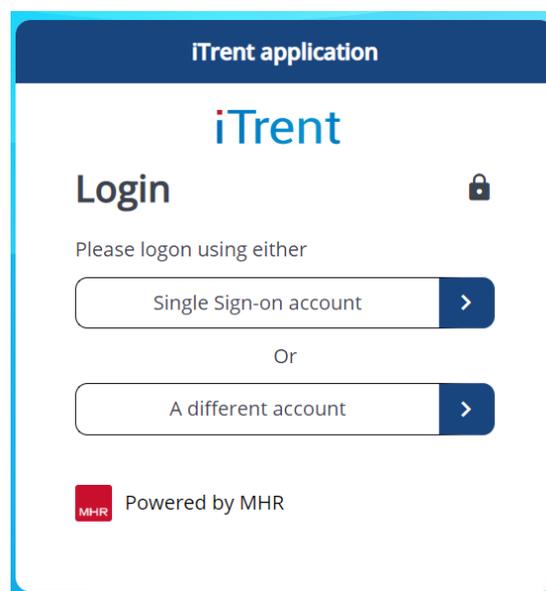
1 Contents

1. Introduction

1.1   Overview

iTrent People Manager has now been moved to cloud based and has a new look.

1.2   How to log in

iTrent can be accessed via the NCG intranet _____ and clicking the iTrent people manager icon.

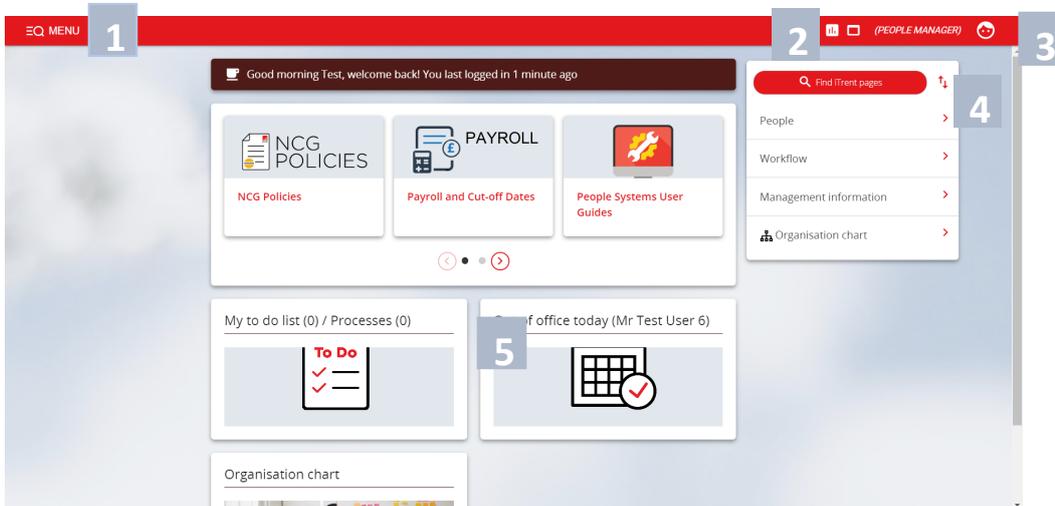If you are accessing iTrent when on campus or connected to the VPN, you will now be automatically logged in via single sign on.

2. Navigating the Home Page

2.1 The Home Page

One of the biggest changes in iTrent is the redesign of the home page, as shown below:


1. Menu – Access to quick search.
2. New View - You can have multiple views open within a single browser window.
3. Top Menu – Allows you to change roles, your preferences, learn more about iTrent and Log off.
4. Sections – Here are the links to navigate to different pages within iTrent You can view information on staff, run reports on staff amongst other options.
5. My to do list / Processes - Any processes working in the background of ITrent can be found here. This could be when you are running a report or have Time & Expenses to approve for example.

2.2 Person summary

From the Home Page, you can access various types of information on any person.
To access the person summary page, click on the **People** category on the home page:
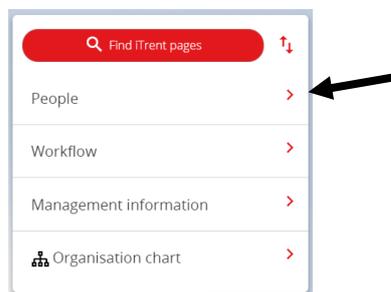
On the left panel it will show all the staff you line manage. If you need to do a search, type in the Employees surname and press the magnifying glass. **Note:** you can use the drop-down box to change to Forename, Employee Number etc.
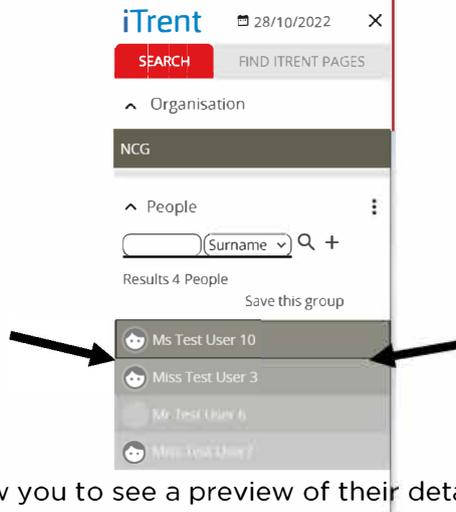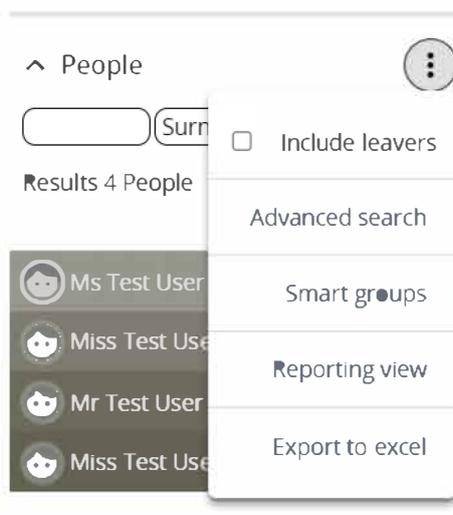
Hovering over a name it will allow you to see a preview of their details. These details include Name, Unit, Job Title, Personal Reference Number etc.
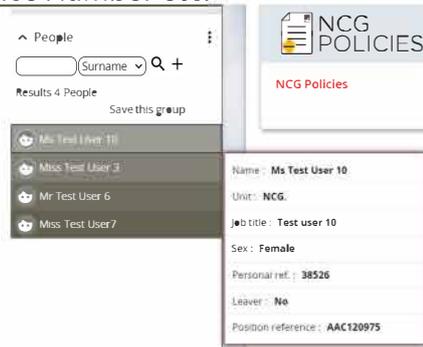
You can also do an advanced search by clicking on the ellipsis

Then click on Advanced Search, there are also other features which you may find beneficial.

Once you have selected an individual, their dashboard will generate. The Personal Summary page provides you with staff information and links to pages to view different information for that person.

You will be able to view Personal Information for the member of staff, Employment Details and also a quick overview of the remaining holiday allowances for that person. Here is the overview in 2 images:

2.3 Find iTrent pages

Using the menu button at the top left of the Home Page, you can use the quick search to find links more quickly. To do so, select **Find iTrent Pages** and in the search bar type in what you are looking for. The **Find iTrent Pages** will also load the most frequently visited pages you open. All you will need to do is click one of the options and it will load straight to the page.
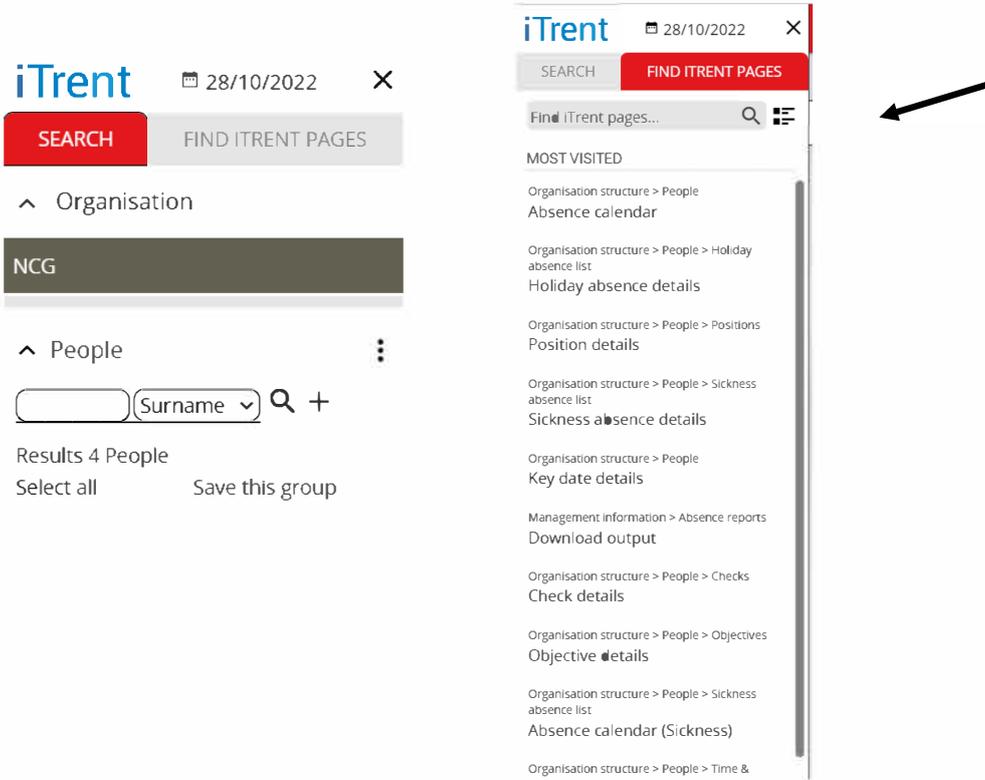

2.4 Using Effective date

iTrent can look at data at 'a point in time' so by changing the effective date, iTrent will present data at that point in time. Normally, the effective date would be the current date which can also be represented by entering a 't' into the effective date field.

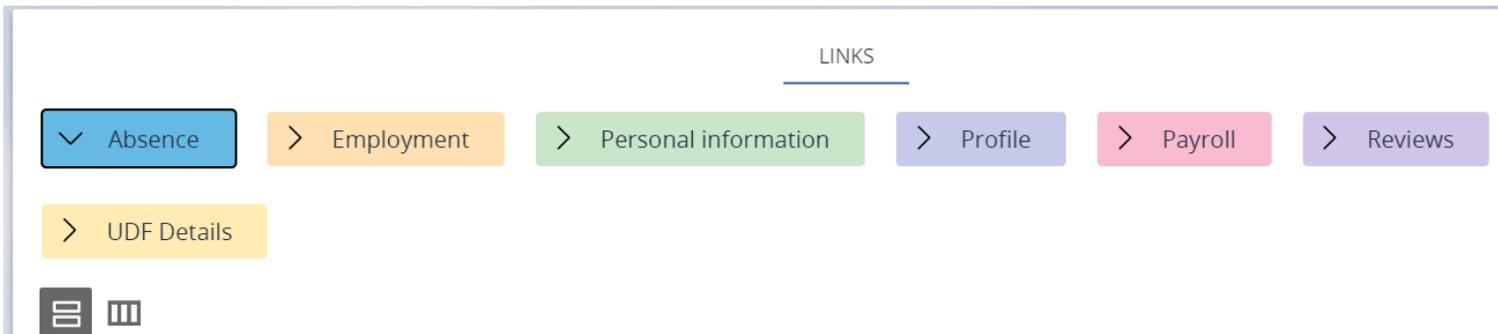The effective date in Electric can be found on the menu here:

If you click on the effective date it will give you the option to change this date as shown below:
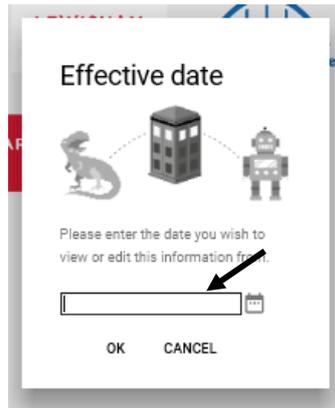
Simply enter the date here that you want the data to show effective from that date, or you can use the calendar at the side.

3. Using links within the Person Summary

Absence

- �J **New Holiday Absence Details** - You can add employees holiday details in on their behalf.
- �J **View Holiday Absence Details** - You can view every individual holiday absence.
- �J **Holiday Entitlement Summary** – Shows the holiday entitlement for the year including a list of the breakdown of each period of holiday absence and the length they were off. At the bottom of the list it shows the balance remaining which correlates to the holiday absence gauge on the Employee's dashboard.
- �J **Holiday Entitlement Adjustment** – You can amend employees holiday entitlement for example any outstanding holiday from the previous year hasn't been carried forward, you make an adjustment here.

Please Note: Managers will still approve/decline holiday requests through their To Do list on the Home screen.

- �J **New Sickness Absence Details** - You can add employee's sickness details in on their behalf.
- �J **View Sickness Absence Details** - You can view every individual sickness absence.
- �J **New Certification** – Add certificate details in here such as fit notes
- �J **Certification Details** – View all employee's certificate details

- ▰ **Maternity Absence Details** – Shows all Maternity Absence details.
- ▰ **Paternity Absence Details** – Shows all Paternity Absence details.
- ▰ **Adoption Absence Details** – Shows all Adoption Absence details.
- ▰ **Shared Parental Leave Details** - Shared Parental Leave details.
- ▰ **New Non-Sickness Absence Details** – You can add non-sickness absence details for an employee.
- ▰ **View Non-Sickness Absence Details** – You can view all non-sickness absence details for an employee.

Employment

- ▰ **Probationary Period Details** – Shows the Probationary Period Details for Employee's role/s, whether it has been completed within the six months or has been extended with reason/s stated.
- ▰ **Qualification Details** – Lists all the qualifications that the Employee has completed and to what level.
  Qualification and Development Overview – This is a summary table of all Checks (Police/List 99), Membership, Training/Personal Learning Events, Participant Event and Qualifications.

- ▰ **Employment Checks** – Where you can look at DBS, Governor Details, Home Office and Identity Evidence, Issue Tracking, Mandatory Training, Medical Questionnaire, Reference, Request To Work Outside College, Student/Client Contact and Volunteer Details.

Personal Information

- ▰ **Personal Details** – Name, Personal Ref number and start date found here.
- ▰ **Key Dates** – Shows Employees DOB, Start Date (of their current role), Length of Service and Reckonable Service date (the date they started their employment).
- ▰ **Address Details** – Shows Address details dependent on effective date.
- ▰ **Contact Details** – Shows Personal email, user email and mobile contact details dependent on effective date.
- ▰ **Emergency Contact Details** – Shows Emergency Contact details.

Payroll

- ▰ **New-Time & Expenses Claim** – Where a manager can add Employees Time & Expenses Claim – Casual Hours/Overtime Claims, Commission Bonus & Fees Claim, Hourly Payments and Meeting Hours Claim, if the colleague is unable to do so themselves
- ▰ **Authorise Time & Expenses Claim** – This should be used to authorise a claim raised by the manager. Claims raised in the normal way by the colleague should be authorised by the manager through their To Do List on the Home Screen..
- ▰ **View Time & Expenses Claim** – To view the claim submitted.
- ▰ **Time & Expenses Claim Summary** – Provides a summary list of all the claims.

Review

- ▰ **Performance Review Form** – Here you can view previous Performance review forms.
- ▰ **End of year Appraisal** – Where to complete an employees End of Year Appraisal.

4. Task Redirection

If you are due to be away from work for a period of time then you can redirect any tasks to another manager so they can authorise any requests that would be requested in your absence.

Go to the iTrent homepage and click on **Task redirections**:
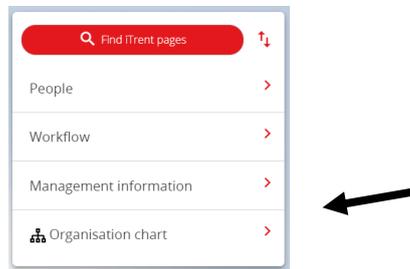
The following will appear, then click on **My task redirection details:**
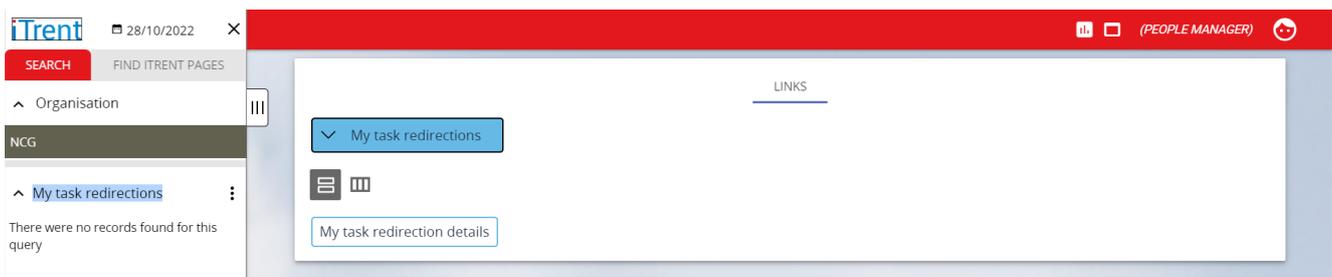
The following page should then appear:

Complete the following fields as shown below:

Field	Description
Start Date	The Start Date you would like the redirection to start.
End Date (Optional)	The End Date of the redirection.
Process Type	You can pick from the following options: Redirect All, Requisitions or Learning Events.
Redirect to	Search for the member of staff you would like to redirect all requests through to.
Password (Optional)	You can choose to add a password for extra security.

Once you have entered all of the information please click save then your redirection should now be in place.