Time and Expenses Manager Guide

Updated 31/10/2022

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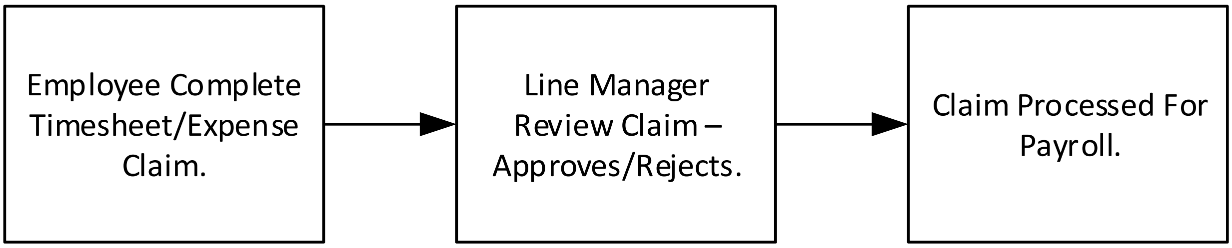
1. Introduction

1.1 Overview

All claims that your team members submit must be reviewed and either approved or declined by the 21st of each month (unless advised other by Payroll), in order for them to paid at the end of the month. The workflow of the expenses is depicted below

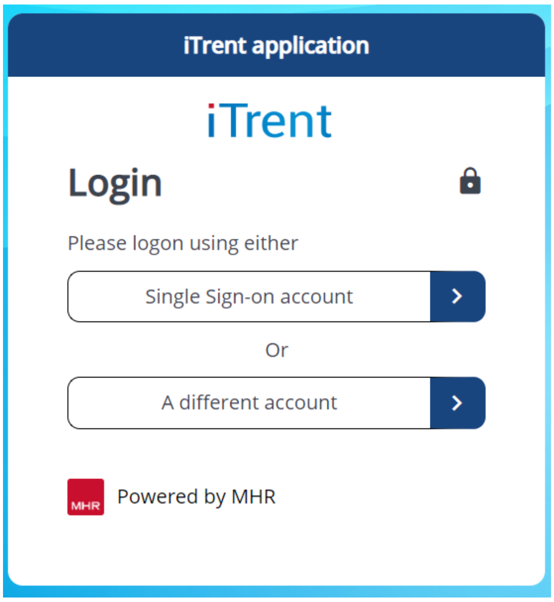


Please note: Please ensure that your team members submit their claims on a weekly basis to ensure that there is no build of claims by the 21st of the month. This ensures that you don't have to frantically approve or decline expenses at the last minute.

1.2 How to log in

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

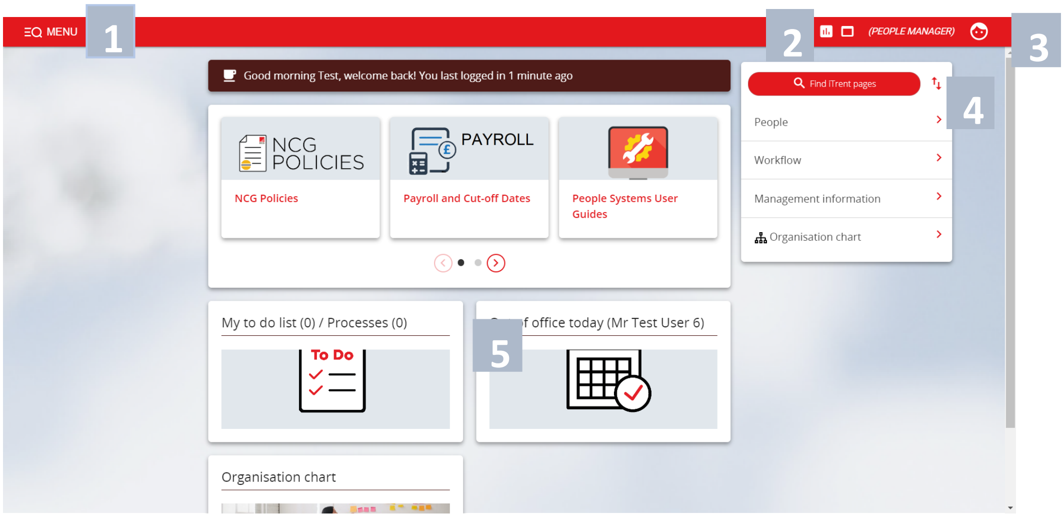
If you are accessing iTrent when on campus or connected to the VPN, you will now be automatically logged in via single sign on.



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:

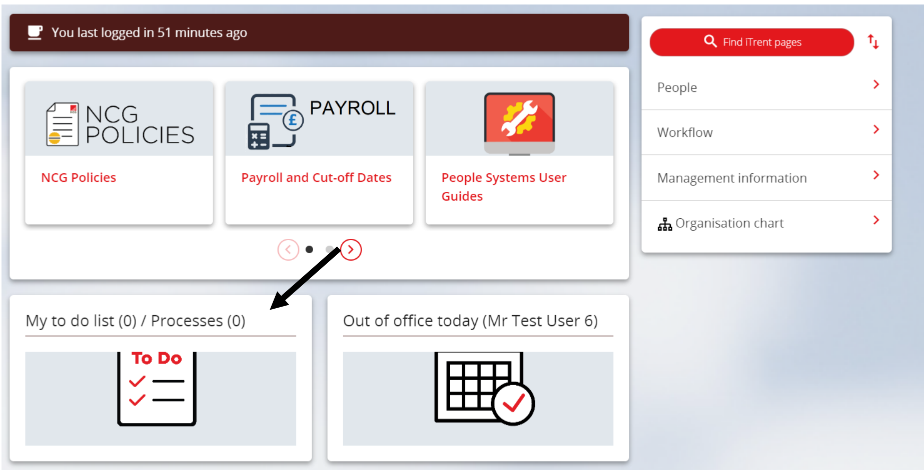


1. Menu – Access to quick search.
2. New View - You can have multiple views open within a single browser window.
3. Top Menu – Allows you to change roles, your preferences, learn more about iTrent and Log off.
4. Sections – Here are the links to navigate to different pages within iTrent You can view 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.

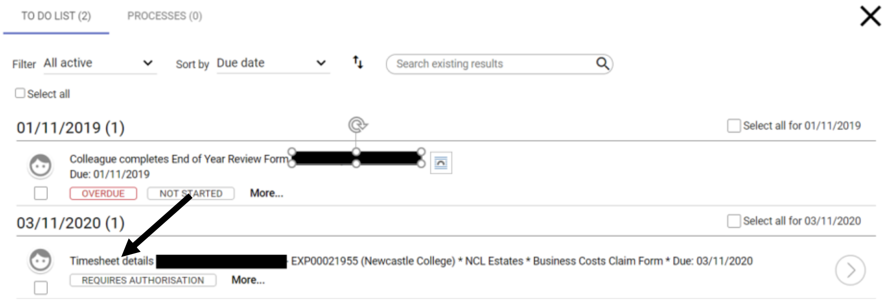
3. Authorising expenses

3.1 Authorising claims via the To Do section

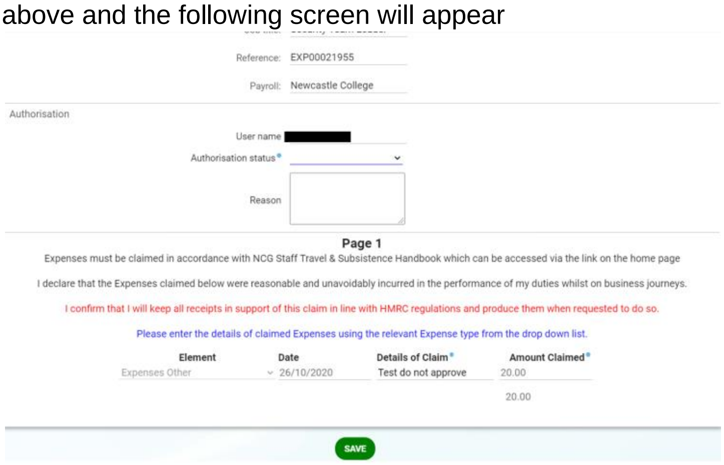
When a claim is submitted you should receive an email to state that there is a claim in to approve/decline. Log into iTrent and go to the home page. Click on the To Do section



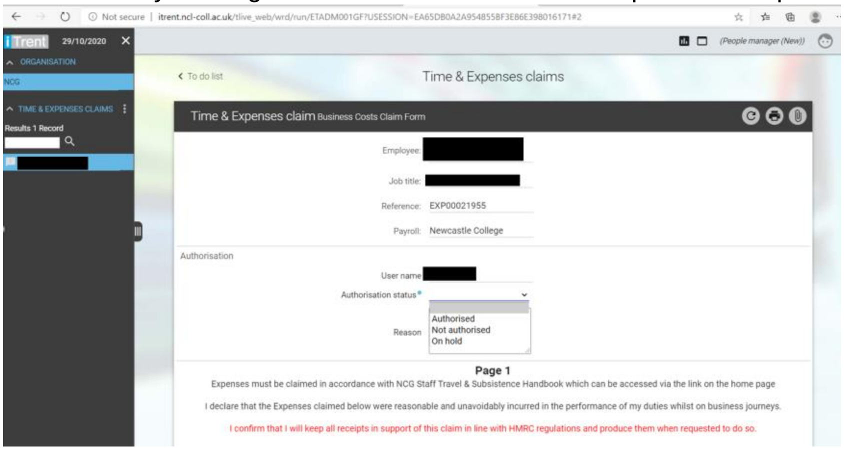
You will see that there is an expense claim to review



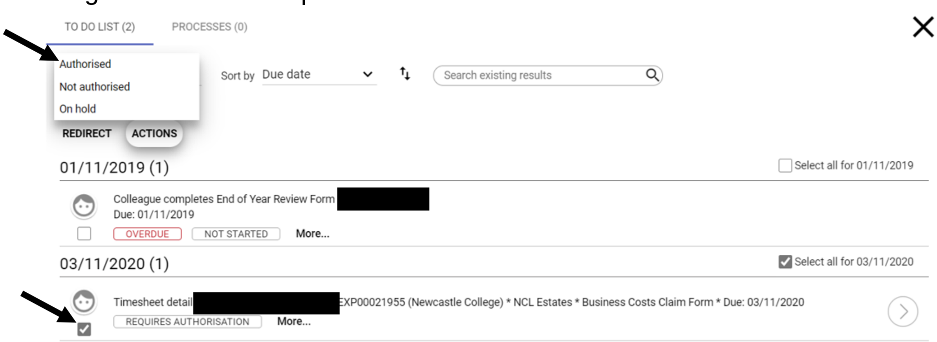
Click on the description as above and the following screen will appear



You can authorise the claim here by clicking on the Authorisation status drop down and press save



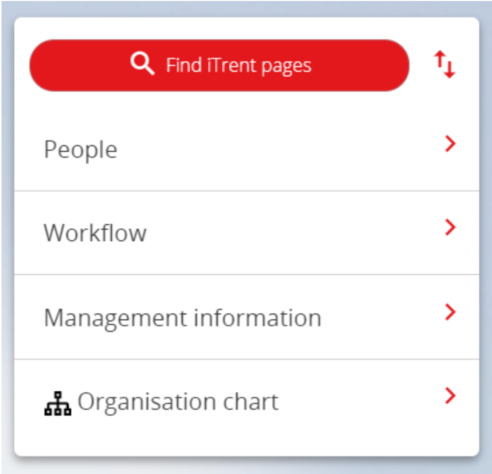
Or if you click on the iTrent icon iTrent then go back into your To Do list, you can authorise from there by selecting the claim using the tick box and press Actions then either Authorises/Not Authorised/On Hold.



4. Adding a Time/Expense claim

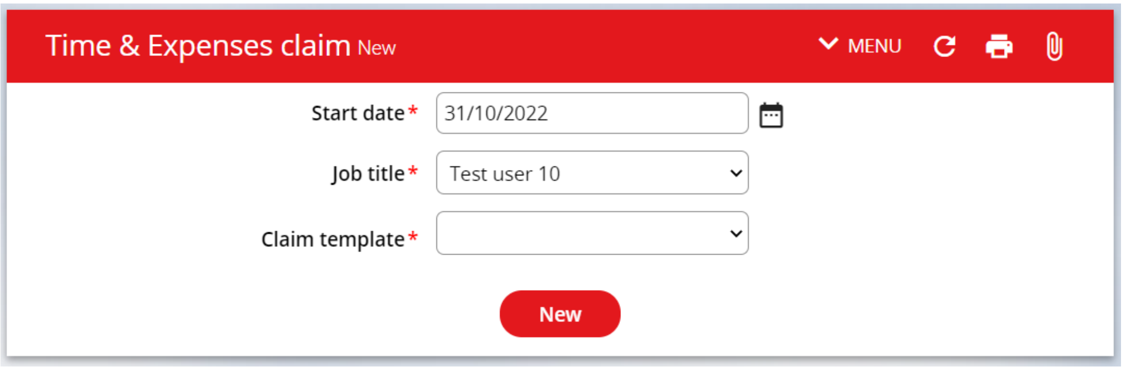
4.1 Adding a claim on behalf of an Employee

If for some reason that an Employee cannot enter their Time and Expenses, you can do this for them. To do this go to People.



Then select the person and click on Payroll then New-Time & Expenses Claim

Add the Start Date, ensure the correct role is selected if they have more than one, select the claim template and press new



Enter the details in of the hours in or other dependant on the claim used, then click save and the Expenses have now been added.