Supporting your department with annual leave

Click HERE to log in

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Introduction

What is a Leave Administrator and what will my responsibilities be? Upon the launch of People Manager a Leave Administrator will be identified in each department/section. As a Leave Administrator you will act as a point of contact in your department/section for queries on annual leave.

The types of queries you encounter may include questions about annual leave balances/entitlements within HR Organiser or you may have to make adjustments to entitlements on behalf of reporting managers. As a Leave Administrator you will be able to view employment information for those within your section. Information will include key date details, position details and contracted hours.

Your access to the system will also enable you to carry out some light system maintenance responsibilities, these will include:

- Checking employee annual leave entitlements
- Adjusting holiday balances in accordance with any carryover an employee has had agreed
- Redirecting workflow requests to an appropriate reporting manager in another managers absence
- Managing Peer Groups
- Recording annual leave for the department into a central calendar, if required

This guide will take you through each of these responsibilities.

Data Protection

As a Leave Administrator you will only be given access to employment information related to employees in your department. However it is essential that you still follow the University’s Data Protection Policy and Staff Privacy Policy - please take the time to read these. Some areas of the system may contain highly sensitive and personal information about your employees, therefore it is very important that you use iTrent responsibly and securely.

Important Security Information

When you have finished using your Leave Administrator role in iTrent please always ensure that you log out. To do this click on the ‘Logout’ link in the top right hand corner.

If you have more than one role in iTrent then your current role will be displayed. Using the dropdown you can switch between roles meaning you do not have to log out and back in again (for example if you are also a People Manager).

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 iTrent 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 desk@essex.ac.uk or call x2345.
Logging in to iTrent

iTrent is accessible at the following link: https://ihr.essex.ac.uk/tlive_web/

You will 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 and your emails.

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 more than one role in iTrent then you will be prompted to select a role from the drop down list. You should select Leave Administrator. If your Leave Administrator role is your only role in iTrent then you will be logged straight in.

Having trouble logging in? Your password must not contain any of the following characters " £ ¬ ¦ | \ if it does you will need to reset it, which can be done here: https://www.essex.ac.uk/password/login.aspx If you are still having problems please contact the IT helpdesk.

Note: do not use the internet browser refresh or back/forward buttons when navigating through iTrent as this will expire your session.

The Homepage

When you first log in to iTrent as a Leave Administrator this is the screen you will see.
You can resize the Object and Display panels by hovering between the two and dragging them to your desired settings, making either one of them larger or smaller.

The Navigation Trail
As you make various selections the navigation trail will update to indicate the selections you have made. The trail is made up of individual items; each item is split into a header (bold text) and its contents (normal text). You can click on a navigation item to return to that point in the trail.

The Control Bar
The control bar holds useful buttons to quickly move around the system. Your name and today’s date appear towards the left hand side of the toolbar. The effective date is next to today’s date and towards the right hand side you will find a series of buttons. The first button is the New View button and clicking on this opens up a fresh screen without disrupting your existing screen. The Full View button maximises what you can see in the display panel. The Help button allows you to look for more information on specific fields, essentially an iTrent dictionary. Finally the Log Off button allows you to exit iTrent. Please use this button rather than clicking on the X as it can cause application issues.

The Display Panel
The display panel performs two functions. When you first log in the display panel is your homepage with various options to the following sections:

Bookmarks – you will not need to use this area as all screens you require are accessible from the Links menu
Links - this is the main navigation menu for users, where you will access all available screens
Out of Office – this area will show when one or more employees are absent in iTrent (due to sickness, holiday or a learning event)
To Do List – this area will show tasks which require action, for managers this will be where they will authorise annual leave and other tasks
Processes – this will show any Management Information reports or system processes which may have been run in the last 24 hours
Messages - this will display any standard messages sent to all iTrent users
User Settings – this area allows you to amend some basic user settings relating to your iTrent access, you are advised not to change any of the settings in this area

To get back to the homepage to view your links and your to do list click on the home icon at the front of the navigation trail. You can do this from any page you are in.

The second function of the display panel is to display the results of your selections.
Searching for an employee
To start a search, go to the Object Panel (bottom left corner) of iTrent where you will find the **Organisation Structure** folder. In here select **People**. This will allow you to search for a person. You will be prompted to enter a surname. Enter the name and press enter or click on the magnifying glass.

Your search results will be shown on the left hand side. From here you can either select an option using the folders in the **Object Panel** or you can choose from the links in the **Display Panel**.

**Links**
The links in the **Display Panel** give you the option to view:

- Personal Details (name, title, gender, previous names, start date) – this data can only be updated by HR (staffing@essex.ac.uk)
- Key Date Details (includes date of birth and expected retirement date)
- Position Details/Reporting Manager (position, location, end date, reporting manager)
- Peer Groups (the groups that are set up and their members)
- Hours and Basis (contractual hours, weeks worked, type of employment)
- Working Pattern (hours worked each day)
- Absence Calendar (driven by the Peer Group allowing you to view department absences)
- Holiday Date Details (dates booked off by an employee)
- Holiday Entitlement Summary (an overall summary of an employee’s entitlement)
- Holiday Entitlement Adjustment (amend an employee’s entitlement)
- Task List Administration (redirect tasks to another manager)

After searching for a person click on one of the links for the information you require to be displayed.
Absence Information

Holiday Entitlement Summary
If an employee wants to know their entitlement for the year you need to select the link for Holiday Entitlement Summary. This screen will show details of the leave booked by an employee. This includes their annual leave entitlement, all the annual leave they have requested and any bank holidays and University closure days which have been automatically loaded in to the system.

For employees 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 187.2 hours (26 days).

For employees on grades 7-11 they are entitled to 201.6 hours (28 days) basic annual leave. Long service does not apply. This is pro-rated for part time employees.

Note: employees do not see this screen in HR Organiser.
Conversion from days to hours
The University has decided that all annual leave will now be calculated in hours instead of days. This will allow managers to process leave requests across our working spectrum consistently for all staff.

Below is a conversion chart of days to hours for a standard working pattern of a full time member of staff. This covers both grades 1-6 and 7-11. If an employee is on any other working pattern the system will automatically take off one day based on their individual hours for that day. Their entitlement will be pro rata to a full time member of staff.

### University of Essex Annual Leave Conversion Table

<table>
<thead>
<tr>
<th>Days/Weeks</th>
<th>Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>Half day</td>
<td>3.6 hours</td>
</tr>
<tr>
<td>One day</td>
<td>7.2 hours</td>
</tr>
<tr>
<td>Two days</td>
<td>14.4 hours</td>
</tr>
<tr>
<td>Three days</td>
<td>21.6 hours</td>
</tr>
<tr>
<td>Four days</td>
<td>28.8 hours</td>
</tr>
<tr>
<td>Five days (1 week)</td>
<td>36 hours</td>
</tr>
<tr>
<td>Ten days (2 weeks)</td>
<td>72 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement Grade 1-6 (23 days)</td>
<td>165.6 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 5 years’ service (24 days)</td>
<td>172.8 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 7 years’ service (25 days)</td>
<td>180.0 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement after 12 years’ service (26 days)</td>
<td>187.2 hours</td>
</tr>
<tr>
<td>Total Annual Leave Entitlement Grade 7-11 (28 days)</td>
<td>201.6 hours</td>
</tr>
</tbody>
</table>

### Working Patterns
A working pattern is a representation of a member of staff’s working week, the days of the week an individual works, and the hours they work on each of those days. Working patterns can also accommodate rotational patterns, shift and compressed hours etc.

For full time employees the default working pattern is applied automatically, unless they are expected to work on a Saturday or Sunday on a regular ongoing basis. This is 36 hours per week, 7.2 hours per day Monday to Friday. In iTrent it is represented as below:

Aside from the default working pattern detailed above, it is possible to accommodate many other working patterns within the system as agreed by HR.
Why are working patterns important?
Accurate working patterns are a very important part of iTrent. Every time any absence is recorded in the system it will check the current working pattern of the individual to see how many hours they are due to work on that day. In the case of annual leave this number of hours will be deducted from an employee’s annual leave entitlement. If an incorrect pattern or no pattern is held within the system it will be unable to calculate entitlements correctly.

How do I check an employee’s working pattern?
Select the employee using the People search, under Employment select Positions, Patterns then Pattern Details. This shows the working pattern assigned to the employee. Alternatively select Working Pattern from the links page.

What if the working pattern is wrong?
You should contact HR immediately for this to be corrected (staffing@essex.ac.uk).
**Holiday Entitlement Adjustment**

This screen will allow you to enter any manual adjustments you might need to make to an employee’s Holiday Entitlement. Managers have access to this screen and can do it for their employees however they may ask you to do it on their behalf. For example you might need to add leave that has been carried over from the previous leave year. This is not an automatic process and it will need to be manually done. It must be agreed by the manager prior to making the adjustment.

To make an adjustment select ‘Adjust’ from the Adjustment type drop down list. Make sure you have selected the correct annual leave year from the Holiday Period dates. A box will appear allowing you to enter the amount of hours you are adding on/deducting and you must also enter a reason. It is important you make the reason clear so it is easily understandable should you need to look back on the adjustment. For example “Carryover from 2013-14”. The end date will usually be the end of the annual leave year. Then click Save. The entitlement will take in to account this adjustment straight away.

If processing carryover for the next leave year this adjustment should only be made on or after the 1st April.

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 and authorised by the employee’s line manager. An employee should never carry over more than 5 days. When a holiday entitlement adjustment is processed as per the above the carryover is automatically included in the total entitlement for the year and will be readily available to the employee to book as annual leave.
Redirecting annual leave requests

If a manager is out of the office and has forgotten to redirect their tasks you can do it on their behalf. You should redirect the tasks to another manager, who has given prior consent.

To do this select: Task List Administration from the Links page. Here you search by the username of the manager whose task you want to redirect. In the drop down menu select User name, another box will appear to the right. Using the magnifying glass to the right of the box click on it and enter the username of the manager. They should then appear in the list. Select the user and then click on GO. The tasks for that user will then be listed below.

Once the tasks are displayed select the tick box for the ones you would like to redirect. Once you tick the box a Redirect button will become visible. When you click on redirect it will then prompt you to search for the recipient (the manager you want to redirect the task to). Again using the magnifying glass search for the manager, this time you can search by surname. If you wish to change the search criteria you can do so using the drop down box. You have the option of forename, surname or username.

Once you have chosen the correct recipient click Save. The task(s) will have been redirected.
Annual Leave Authorisation

When an employee requests annual leave an email notification will be sent to their line manager informing them of it. See below. It includes the employee’s name, position and the dates they have requested. The manager will be prompted to log in to **People Manager** to action the annual leave.

![Annual Leave Request - Action Required](image)

When they log in they will see the request in their task bar. Here they can review it and choose whether to authorise or not authorise it. The employee will receive an email notifying them of their manager’s decision. If the annual leave has been approved they will also receive a diary entry to go in to their Outlook calendar.

*Note: as a Leave Administrator you **cannot** authorise annual leave; it is the manager’s responsibility.*

**Amending Annual Leave from the past**

If an employee is required to amend/cancel an annual leave entry that is in the past they will need to contact their manager who can do it on their behalf. An example of this might be if an employee has booked annual leave but was actually off sick on that day and have notified their manager accordingly on the day.

**Amending Annual Leave booked for the future**

Employees are able to do this themselves via **HR Organiser**. If they wish to cancel they can select the annual leave date under the **Absence** tab. The details of the annual leave will be displayed. They can then select the **Delete** button and a cancel notification will be sent to their line manager. The manger will receive an email notification and a task in their To Do List. To clear this they just need to select it and mark it as authorised.

If an employee wants to amend an annual leave date they can do so but only once it has been authorised by their line manager. Managers are encouraged to action all annual leave requests within 48 hours of receiving them. When they click on the annual leave date the details will be displayed. Here they can make the necessary amendments and click **Save**. The changes will be sent to the manager for approval.

**What if an employee’s manager hasn’t authorised their annual leave but they need to change the dates?** If the request is yet to be approved an employee can delete their original request and rebook the annual leave with the correct dates.

If an employee cancels annual leave after approval they need to remember to delete it out of their Outlook calendar. The diary entry will not be automatically deleted.
Bank holiday/closure days

Employees **DO NOT** need to book off bank holiday or closure days as the system automatically calculates these. These hours will show in an employees scheduled column when they log in to HR Organiser. In iTrent they will show in the Holiday Entitlement Summary screen with the dates pre listed, as below.

If bank holiday dates fall during the period a member of staff wishes to take as annual leave they need to remember to book around them remembering not to include the bank holiday/closure day date(s). For example if they wish to take two weeks holiday between 18th – 29th August but bank holiday Monday falls on the 25th they will need to make two separate bookings.

**WEEK 1** – Monday 18th August – Friday 22nd August  
**WEEK 2** – Tuesday 26th August – Friday 29th August

The bank holiday/closure day entitlement changes each year due to when Easter falls. For the latest information please check the University website here:

[http://www.essex.ac.uk/hr/policies/university-closures.aspx](http://www.essex.ac.uk/hr/policies/university-closures.aspx)

Part time employees receive an entitlement to bank holiday/closure days which is pro rata the full time entitlement. The bank holiday calculators and further information on how the pro rata entitlement is calculated can be found here:

[http://www.essex.ac.uk/hr/current-staff/part-time-leave-calculator.aspx](http://www.essex.ac.uk/hr/current-staff/part-time-leave-calculator.aspx)
Peer Groups

Peer Groups are very important. It is essential to keep these up to date as employees come and go from your department. The Peer Groups drive who a manager can see in their Peer Group Calendar. They will use this when they are authorising annual leave. The Peer Group Calendar allows them to quickly check if there are any other absences in their team. This information can aid them in deciding whether to authorise or decline the annual leave request. If the Peer Groups are not kept up to date a manager won’t be able to see all their employees. This could result in annual leave clashes meaning there is not suitable cover for the department.

Equally the Peer Groups also drive the Peer Group Calendar that employees can see in HR Organiser when they go to book annual leave. Here they can see if another member of their team has an absence. This might influence their decision of whether to request annual leave or not.

In the Object Panel (bottom left corner) of iTrent under the Organisation Structure there is a folder called Peer Groups. When you select this folder you will be presented with a list of Peer Groups. They are listed alphabetically. Each Peer Group within a department is organised into a team and is headed by the reporting manager.

To view a group click on the name and select People in Peer Group under the Peer Group Details folder.

You will then be presented with a list of all employees that belong to this Peer Group including the reporting manager.
Adding an employee to a Peer Group
Select the Peer Group you wish to add the employee to. Click on People in Peer Group and then you will see an option that says **New – Person in peer group details.**

You will be prompted to enter an effective date. You should enter the date that the member of staff is joining the team then press enter. This can be a retrospective date.

You will be taken to the below screen. If you are entering only one employee you can tick ‘Single person selection’. If you are entering more than one employee you do not need to make this selection.

Click on the magnifying glass next to the name box. You will be presented with a People Search. You can select a variety of criteria from the drop down box to search on, however the default is surname. Once your search results have been displayed select the name to be added to the name box. You can then carry on searching for the other employees that you need. Once you have found them all close the People Search and hit **Save.** These employees will be added to the Peer Group.

**Note:** if more than one person displays in the search results be careful to select the correct employee. If the name you are searching for does not appear it may be that this person hasn’t been processed by HR yet.

Removing a person from a Peer Group
When in the People in Peer Group folder click on the name of the member of the Peer Group you want to remove. In the Object panel select **Person in peer group details**, the name and position of the person will be displayed. Here you can select **Delete** to remove them from the Peer Group.
Creating a new Peer Group
To create a new Peer Group select **New – Peer group details** and enter the name of the new Peer Group.

Once the new group is created you can start adding members to it.

Amending a Peer Group
If the reporting manager for a team changes or a member of the Peer Group has a change in position you will need to update the Peer Group. This also applies if an employee **moves position** but still has the **same manager**. Due to the fact their job has changed they will need to be removed and added back in to the Peer Group.  See the previous sections on removing and adding a person to a peer group.

Select the Peer Group that you want to amend and select **Peer group details** you will then have the option to amend the name of the Peer Group. When you are happy click on **Save** and the changes will be retained. If you need to delete the Peer Group altogether you can do so in the same screen by clicking **Delete**.

**IMPORTANT:** remember you are responsible for adding new employees to the Peer Groups. If employees are leaving your department you need to remove them from the Peer Groups but it is the responsibility of the Leave Administrator in their new department to put them in the new group. You only administer Peer Groups within your department/section.

Central Calendar
Some departments currently operate a central calendar where they record absence for the whole department. It is possible to continue this process when switching to managing absence online. We can arrange for an email notification to be sent to a central mailbox each time a member of the department has annual leave approved. As a Leave Administrator you can then make a note of this absence in the central calendar. An example of the notification you will receive is below:
FAQ’s

Logging In and Security

When I try to log in to iTrent 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 iTrent or HR Organiser.

How secure is the information held in iTrent? The data within 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 employee’s need to book the bank holidays off? No. The system automatically calculates and deducts the bank holidays for them. If your employees are booking annual leave they need to remember to book around them.

Can employee’s book leave for next year? Yes, they just need to book it in the normal way; it will automatically come out of next year’s allowance.

I don’t think an employee’s entitlement is correct? Please ask your employee 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 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 by the employee with their manager. Carryover should never be more than 5 days. To add carryover to an employee’s entitlement on behalf of a manager, please refer to the Holiday Entitlement Adjustment section.

An employee works different hours on different days, how do they book leave? As long as an employee’s working pattern is correct the system will deduct the correct number of hours that they should have worked on a particular day. For example if they work 7 hours Monday – Thursday and 5 hours on a Friday the system will only deduct 5 hours for every Friday booked off and 7 for every other day. If this employee wanted to book a week off they would be deducted 33 hours. The duration of hours is displayed on the Absence homepage in HR Organiser so an employee can easily check what they are being deducted when they book leave. They can also view their own working pattern in HR Organiser by going to the Employment tab and selecting their current position. For more details please refer to section on Working Patterns. If the wrong working pattern has been assigned please contact HR immediately.
Managers

The manager can’t see a member of their team when they log in to People Manager? They will need to notify HR as there might be a chance they have not been set up as their reporting manager.

An employee booked annual leave but actually ended up being off sick, what should I do? If the employee didn’t actually take their annual leave then the manager can remove it for them. This way their balance will be credited back with the leave they didn’t take.

The manager is not getting their employee’s leave requests? Are they in junk mail? If not they will need to notify HR as there is a chance the reporting manager is not correct.

The manager is out of the office but has forgotten to redirect their leave requests, what should I do? If a manager is out of the office or has called in sick you can redirect their leave requests to another manager on their behalf.

How long do managers have to approve annual leave requests? We encourage managers to aim to action all annual leave requested within 48 hours of receiving them.

We have a new manager in our department. Do they need to do anything? Although we are notified when a new starter joins the department we do not get informed if they are a manager or not. This means they will have access to HR Organiser but they will not have access to People Manager. As part of your role you will need to notify us of any new managers in the department so we can give them the necessary access to begin authorising annual leave. We are in the process of developing an online request form but for now please just drop us an email.

Employee Information

An employee has two jobs but only one is within our department. The employee will only book leave within their job in your department with you. Absence for their other employment will be sent to their manager in that position. The positions should be treated separately.

An employee’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.

Peer Groups

How often should the Peer Groups be updated? You should update the Peer Groups any time there is a change in your department. If an employee moves position within the department and has a new manager then you should update their Peer Group accordingly. You also need to remember to add new members of staff to Peer Groups as they join your department and remove those who have left.