People Manager

Quick Guide

BUSINESS SYSTEMS TEAM

Authorising/Amending Annual Leave

Click HERE to log in

Contact us:
ihrsys@essex.ac.uk
http://www.essex.ac.uk/staff/hr.organiser/
Introduction

What is People Manager?  People Manager is a tool, allowing reporting managers and administrators with selected access, to manage:

- staff leave
- view sickness records
- view training course records

Further modules such as claiming expenses will be introduced to make your working life easier and more efficient will be introduced shortly.

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 'Logout' link in the top right hand corner of the People Manager page.

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 desk@essex.ac.uk or call x2345.

People Manager 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.
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](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 People Manager as this will expire your session.*

**Authorising Annual Leave**
This section only applies to staff who book annual leave using HR Organiser

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

The request appears as above. It details the employee'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 box on the right hand side.

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** link, here are 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 drop down 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 drop down menu to authorise and then press **Save**.

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 an employee 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 Organiser. You will need to amend this on their behalf. To do this you need to go into the Holiday Date Details screen. Please refer to the Holiday Absence Details section.

Amending/Cancelling Annual Leave booked for the future
Employees are unable to amend their own annual leave dates until you have authorised them. If an employee 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 an employee 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 on your links page under Holiday Date Details. 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 can not 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.
Input a Holiday Entitlement Adjustment
This screen will allow you to enter any manual adjustments you might need to make to an employee’s Holiday Entitlement. For example you might need to add leave that has been carried forward from the previous leave year. This is not an automatic process and it will need to be manually done.

To make an adjustment select ‘Adjust’ from the Adjustment type drop down menu. Make sure you have selected the correct 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 “Carry forward 2013-2014”. 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.

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 by employees can be redirected to another manager in your absence. To do this select: Manager Task Redirection. 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 select the magnifying glass and enter the surname of the person you want the tasks to go to. Click Save.

Please note if you regularly have other tasks in iTrent you may wish to change the process type to task processes and in process search for ESS - Annual Leave Booking. This is only likely to apply to members of HR.
Absence Calendar

The Absence Calendar displays all staff absences that have been recorded in iTrent. This includes:

- Learning events
- Bank holidays
- University closure days
- Maternity/Paternity absence
- TOIL (coming soon)
- Sickness

As a People Manager you can review absences within your responsibility. It is possible to display the calendar for more than one reportee at any one time. You can do this by pressing (and holding) the Ctrl key and clicking the name of each person you wish to view. Then click on Absence Calendar.

Under the Calendar selection options you can choose the period you wish to display. Choose from the drop down. By selecting the + next to Calendar colour options you can view all the different types of absences and how they are colour coded. Any colour changes will be reflected in the Out of Office section on the homepage.

Use the tick box next to the absence to include/exclude it from the display. Non-working periods will be displayed on the calendar using the colour for Other absences.
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/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 the Refresh button for it to update.

You also have the option of adjusting the display period by clicking on the adjustment buttons. This will take you back or forward 3 months or back or forward 1 month.

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 and date. Type of holiday, status (e.g. awaiting authorisation), position, working pattern and working pattern start date. Some employees will hold more than one position.

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.
Managing Learning

Viewing information on employees learning activities

Under the **Learning Information** section on your **Links** page you can view the personal learning of your employees and also view the overview of the learning activities available.

To view your employees personal learning, firstly click on their name in the object panel on the left hand side. Then select **View Employee Personal Learning Details**. You will be prompted for an effective date. If you wish to enter today’s date you can simply enter ‘t’ as a shortcut for today. Hit enter or click ‘confirm effective date’ to continue.

In the display panel you will then be able to view all of your employees personal learning. This shows **Participant events** which are learning activities that your employees have booked or attended since the launch of HR Organiser. Under **Personal learning events** you will see historical learning activities that have been loaded from legacy systems. This is also where you will see any personal learning that employees have entered themselves. This could include external courses/conferences or workshops that they have attended and have recorded in HR Organiser.

If you want to view further information you can do so by clicking on one of the learning activities. This opens a new window and displays the event details as per the next page.
Participant event details

| Event name: Awareness of psychological type in teaching and supporting learning: Myers Briggs (part 2) |
| Start date: 30/04/2015 |
| Start time: 9:15:00 |
| End date: 30/04/2015 |
| End time: 16:45:00 |

Personal learning event details

| Event title: Assertive Communication Skills at Work |
| Internal: ✔ |
| Start date: 18/10/2004 |
| End date: 18/10/2004 |
| Duration: |
| Learning hours: |
| Learning event code: SACSW 0413 |
| Score: |

To go back to the employees learning information select the tab at the bottom right of the screen:

Within People Manager you can also view which learning activities are available and see an overview of them. On the homepage select View Learning Activity Overviews. You will be prompted to enter a 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 further details will be displayed on the right hand side in the display panel.