



**Royal
Veterinary
College**
University of London

**iTrent
Manager Self Service
User Guide
ELECTRIC**

Version Control:

Version	Date	Author	Change Description
1.0	May 2020	Les Soden	Electric Version
1.1	Feb. 2023	C. Ocansey	Look & feel improvements. Updating new screens.

© The Royal Veterinary College 2020.

This document and its content, including without limitation text, logos, icons, photographs and all other artwork, is copyright material of The Royal Veterinary College, the nature of which is confidential. It must not be copied, reproduced, modified, altered or circulated to any third party, in any form or media, without the prior written consent of The Royal Veterinary College.

Contents

- Introduction 3
- What is Manager Self Service? 3
- Important information about Annual Leave Entitlements 3
- 1. Logging in..... 5
- 1. Menu 7
- 2. Reorder home page 7
- 3. Find iTrent pages 8
- 4. Quick Links 8
- 5. My Team 9
- 6. Viewing absence record 10
- 7. Annual Leave drill down : 12
- 8. Management Information..... 12
- 9. Workflow 13
- 10. My Dashboard 14

Introduction

The College's continued use of iTrent for its HR/Payroll system enforces its commitment to technological change and to the needs of College employees and managers. This includes improving access to important staff information, which incorporates the ability for our employees and managers to access personal and job related information held on iTrent, through Employee Self Service (MyHR ESS) and Manager Self Service (MSS).

What is Manager Self Service?

The Manager Self Service allows managers to view information about their employees (those who report directly to them and those employees who report to the manager's reportees). This includes some basic personal information and certain management data about employees.

It also allows managers to view certain absence information, authorise absence requests and provides a record of their employees' absence record. In addition, managers can run some management information reports which interrogate the iTrent data. This means that the College will have more accurate and up to date details on record, whilst at the same time making it easier for managers to view important staff data at a touch of a button to aid key management decisions.

Important information about Annual Leave Entitlements

All Employees can request Annual Leave Absence electronically through the system. The iTrent system has been set up to be as consistent as possible across the College, therefore annual leave entitlements are showing in hours. There are a number of reasons for this, ranging from ensuring consistency to making it simpler to manage leave entitlements across the College.

Booking of annual leave is either in Full Day, Part Day (i.e. AM or PM) or More than One Day options - the system will reduce the balance accordingly depending on hours to be worked on the day(s) requested. This is why it is important to have an accurate working pattern recorded for the employee.

For those who complete their contractual hours in a standard pattern each day (i.e., the same hours each day), then it is a simple calculation to calculate the number of days the hours entitlement relates to as follows:

Total Number of Hours Entitlement / Number of Hours worked per day.

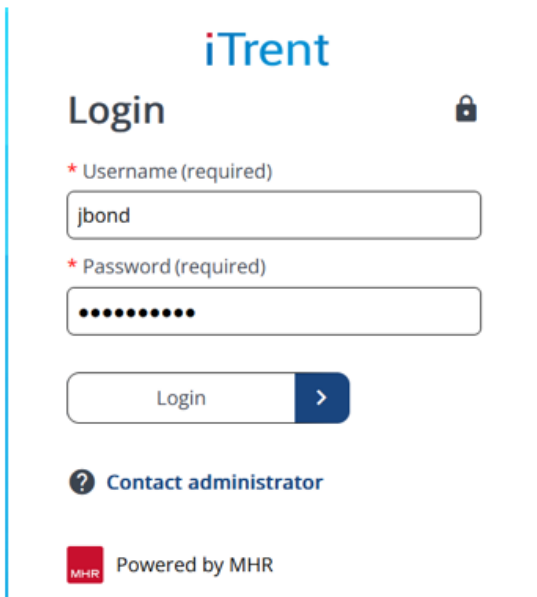
Example,

- A full-time employee working a standard 35 hours per week (7 hours per day), would show as 210 hours entitlement. This would equate to 30 days entitlement (i.e., 210 / 7). *

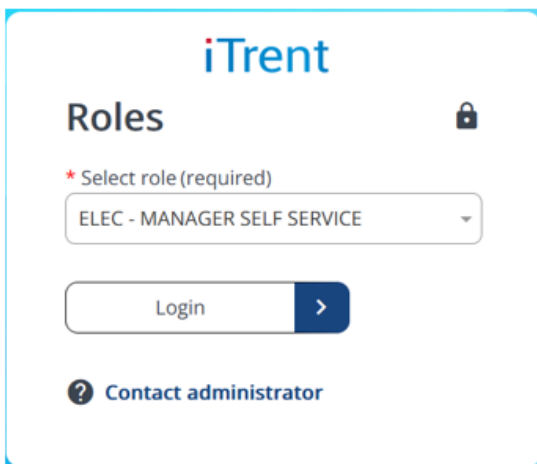
*Employees who were previously entitled to 'Easter' concessionary days will have the equivalent to 3 working days added to their leave entitlement.

1. Logging in

Using Manager Self Service, you can view certain information about your employees. Login will present the following screens:

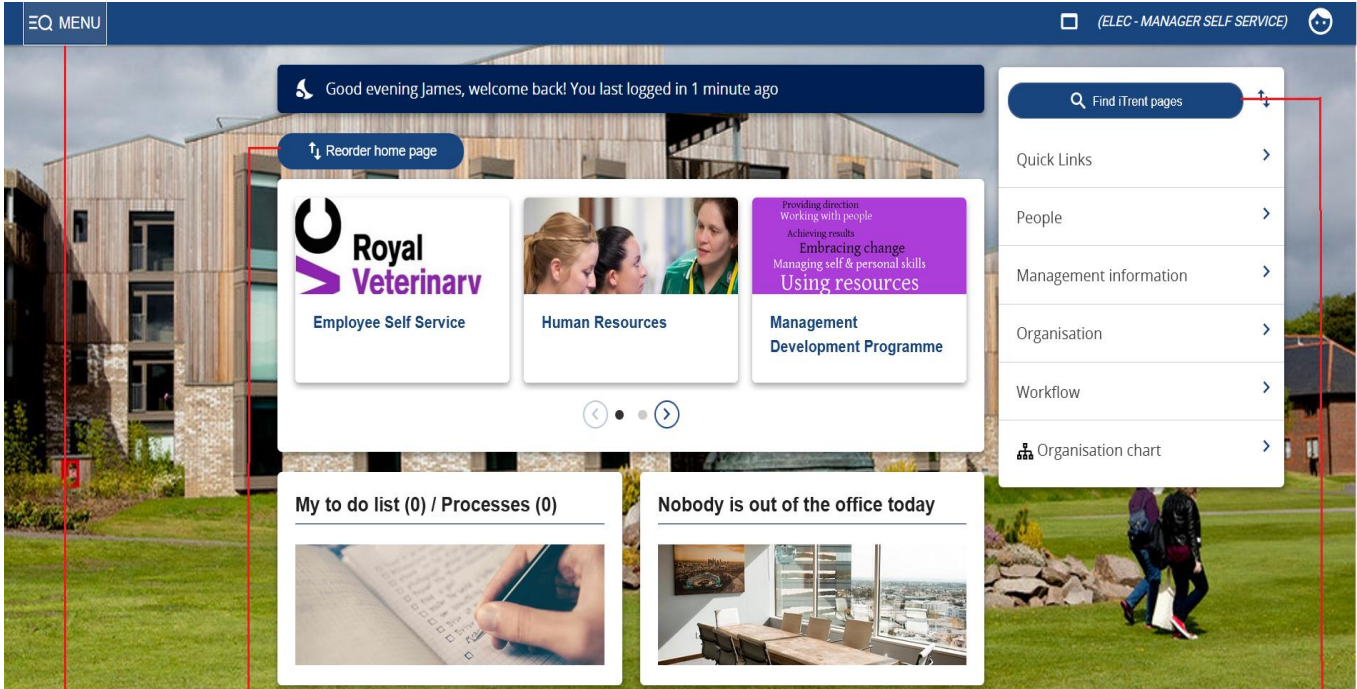


The screenshot shows the iTrent login interface. At the top is the iTrent logo. Below it is the word "Login" followed by a lock icon. There are two required fields: "Username (required)" with the text "jbond" and "Password (required)" with masked characters. A "Login" button with a right arrow is below the fields. At the bottom, there is a "Contact administrator" link with a question mark icon and a logo for "Powered by MHR".



The screenshot shows the iTrent roles selection interface. At the top is the iTrent logo. Below it is the word "Roles" followed by a lock icon. There is one required field: "Select role (required)" with a dropdown menu showing "ELEC - MANAGER SELF SERVICE". A "Login" button with a right arrow is below the field. At the bottom, there is a "Contact administrator" link with a question mark icon.

If you have more than one iTrent role/profile, you can select your profile here. Otherwise the default is Elec – Manager self-service and this step will not be displayed.



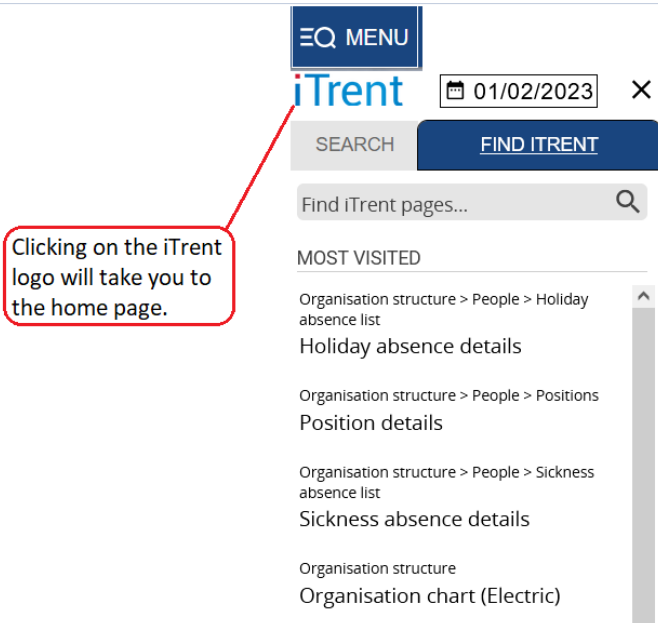
1
Menu - Clicking the menu will provide a list of your most recently visited pages. See example below.

2
Reorder home page - Clicking here will give you the option to rearrange the order of the company news carousel, my to do list, out of office and organisation chart widgets.

3
Find iTrent pages - Clicking here will give you the option to search for pages within the system. This is very useful when you are unsure of the navigation for what you want to do on the system. E.g. You can search for contact details and then select the link to take you to the contact details page.

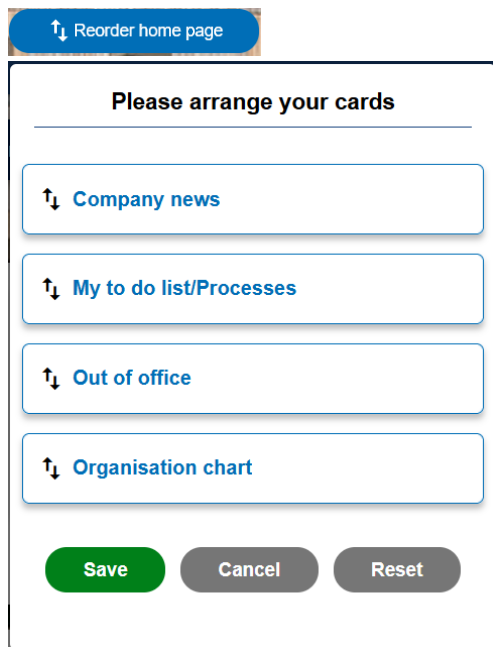
1. Menu

Clicking the Menu will provide a list of your most recently visited pages, and an option to search for pages within i-Trent.



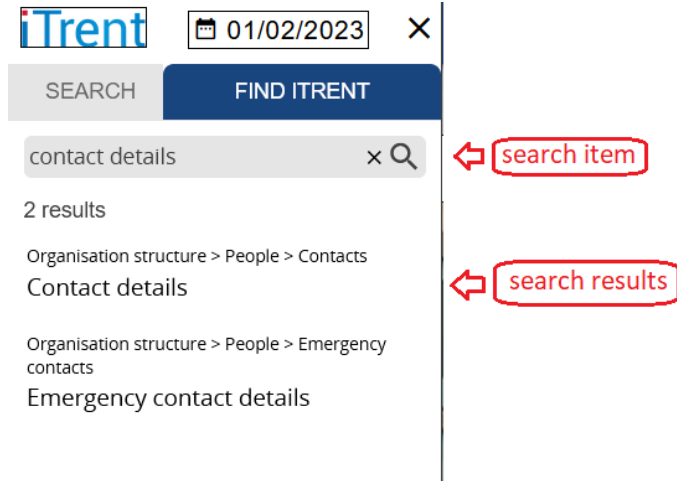
2. Reorder home page

Clicking the reorder home page will give you the option to rearrange the order of the of the company news carousel, my to do list, out of office and organisation chart widgets.



3. Find iTrent pages

Find iTrent pages gives you the option to search for pages within the system. This is very useful when you are unsure of navigation for what you want to do on the system. For example, you can search for contact details and then select the link to take you to the contact details page.

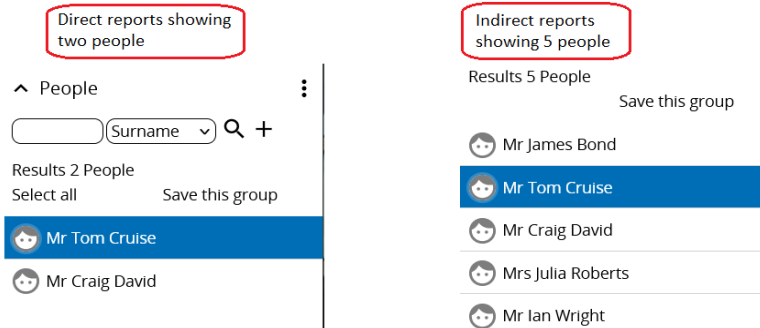


4. Quick Links

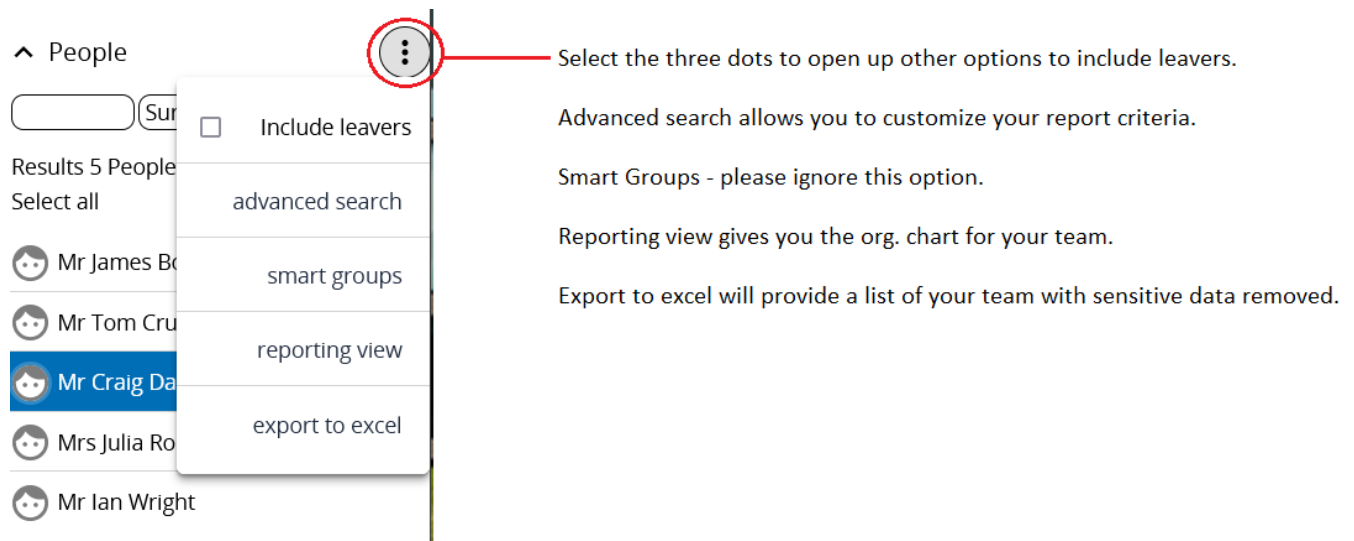


5. My Team

When you search for your team, the initial search will produce your direct reports, hitting the search icon again will display indirect reports. Specific employee search is the same as before, searching by surname, forename etc.



An additional feature is the ability to export the search results into an Excel spreadsheet – click on the three ‘dots’ above the search icon and the export option is there.



When you are in an individual record you will see a summary card for that employee as well as visual management information.

The image shows a summary card for Mr Craid David. At the top, there is a profile picture and the name 'Mr Craid David'. Below this, there are two main sections: 'Personal' and 'Employment'. The 'Personal' section includes the text 'Currently under probationary period review', 'Known as Craid', and '206298 (Personal ref.)'. The 'Employment' section includes 'Research Assistant | Principal's Office', '35.00 hours | Research | Full time | Permanent', 'Occupancy started on 01/12/2022', and 'Reporting manager Mr Tom Cruise, Head of Research'. Below the summary card is a 'Calendar' section for the period '12 May 2019 - 12 May 2020'. It features a 'VIEW FULL CALENDAR' link, a calendar grid for '12 - 25 May 2020', and two circular graphics: one for 'Multiple holiday schemes' (showing a dash) and another for 'Bradford factor inclusive of all positions (as of last calculation)' (showing the number 16).

By clicking on the graphics you drill down into the database for detailed information.

6. Viewing absence record

The image is a screenshot of a web application interface for viewing absence records. At the top, there are navigation tabs: 'Personal information', 'Employment', and 'Absence'. The 'Absence' tab is selected and highlighted with a red box. Below the tabs, there are four buttons: 'Holiday absence details', 'Absence calendar (Holiday)', 'Sickness absence details', and 'Absence calendar (Sickness)'. The 'Holiday absence details' button is also highlighted with a red box. On the left side, there is a sidebar with a search bar and a list of people. The 'expand screen' icon (three horizontal lines) is highlighted with a red circle and a red callout box that says 'By using the 'expand screen' you will see further information relating to the absence'. The sidebar shows the organization 'Royal Veterinary College', a search for 'Surname', and a list of people including 'Mr Craid David' and 'Miss Julia Roberts'. Below the list, there is a 'Holiday absence list' section with a 'Show all' button and a dropdown menu set to 'All holidays'. The list shows dates '09/01/2023' and '05/12/2022'.

Viewing absence calendar for multiple employees.

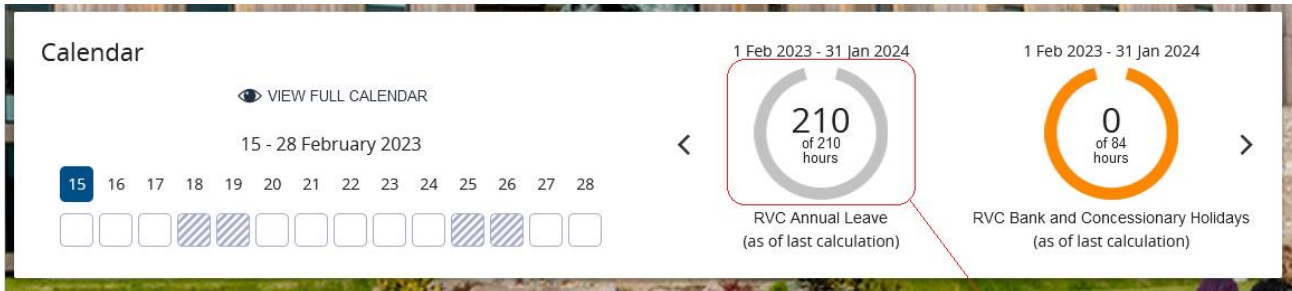
To view the absence calendar for more than one person in your team, press and hold down the Ctrl button on your keyboard and use your mouse to select the employees you wish to include in your calendar view.

The screenshot shows the 'People' selection interface. At the top, there is a search bar with 'Surname' and a search icon. Below it, it says 'Results 2 People' and 'Select all Save this group'. Two employees are listed: 'Mr Craid David' and 'Miss Julia Roberts'. A red callout box points to the selection area with the text: 'Press and hold down the Ctrl button on your keyboard and use your mouse to select the employees you wish to include in your calendar view.'

Below the people list, there is a 'Calendar' section. A red callout box points to a 'VIEW FULL CALENDAR' button with the text: 'Select view full calendar to see the calendars for the employees you have selected.'

The main calendar view shows a date range of '15 Dec 2022 - 15 Mar 2023'. It displays a grid for December and January. At the top of the calendar, there are two circular progress indicators: 'RVC Annual Leave (as of last calculation)' showing '210 of 210 hours' and 'RVC Bank and Concessionary Holidays (as of last calculation)' showing '0 of 84 hours'. A legend at the bottom indicates: 'Bank holiday' (green circle), 'Holiday' (yellow circle), and 'Sickness' (red circle).

7. Annual Leave drill down :



Selecting the 'doughnut chart' will take you to the holiday entitlement summary page where you can see holiday dates booked, duration and entitlement remaining.

Miss Julia Roberts

Holiday entitlement summary

Employment details

Position: Research Assistant

Period details

Holiday period dates: 01/02/2023 - 31/01/2024

Scheme name: RVC Annual Leave

Entitlement for period: 210 hours (210 hours Pro Rata)

From	To	Duration	Remaining entitlement
06/02/2023	08/02/2023	21	189

8. Management Information

Absence reports to run and download, including Outstanding Holiday Entitlement report.

9. Workflow

You have the facility to allocate tasks, such as authorisations to other members of your team in your absence.

The screenshot shows the 'My task redirection details' form. On the left is a navigation menu with 'Workflow' highlighted. The main form area contains the following fields:

- Start date**: 01/02/2023
- End date**: 10/02/2023
- Process type**: Task processes
- Process**: SS Annual Leave Request - New
- Redirect to**: TCRUISE
- Password**: (empty)

Callout boxes provide the following instructions:

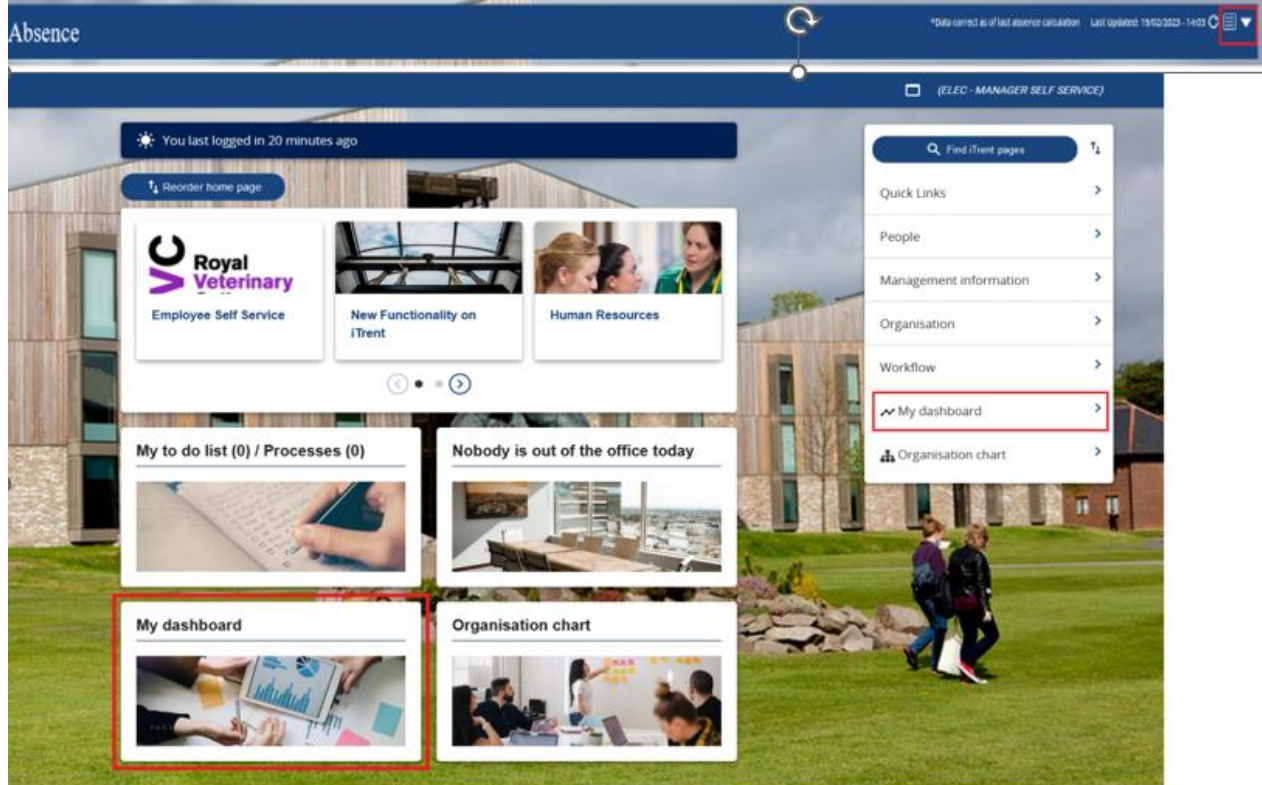
- Enter start and end dates of task redirection**: Points to the Start date and End date fields.
- Search and select the task process you wish to redirect**: Points to the search icon next to the Process field.
- Use the search button to search for the member of staff you wish to redirect your task to**: Points to the search icon next to the Redirect to field.

10. My Dashboard

My Dashboard can be accessed via the links on your homepage or the carousel tab.

Absence

Click on the arrow icon to show absence data



Your team's absence details will be generated.

