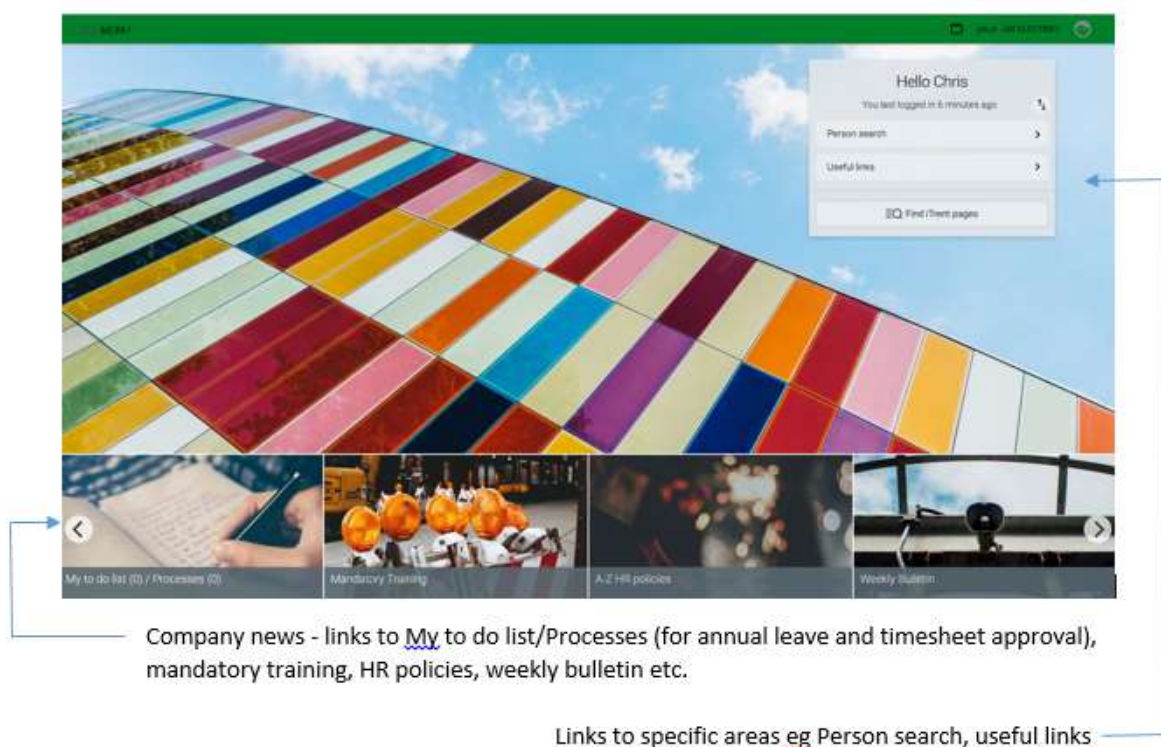


Reference Guide to Annual Leave Administrator (Electric)

This tool enables Annual Leave Administrators to view and amend annual leave records for staff within their College/Service or dedicated area of responsibility.

This information includes some sensitive information and it is important that you use it responsibly to ensure that the security of the staff in your area is maintained. More information on the conditions of use for data from iTrent is available [here](#).

Log into Trent by clicking [here](#) (if you have more than one role select Annual Leave Administrator).

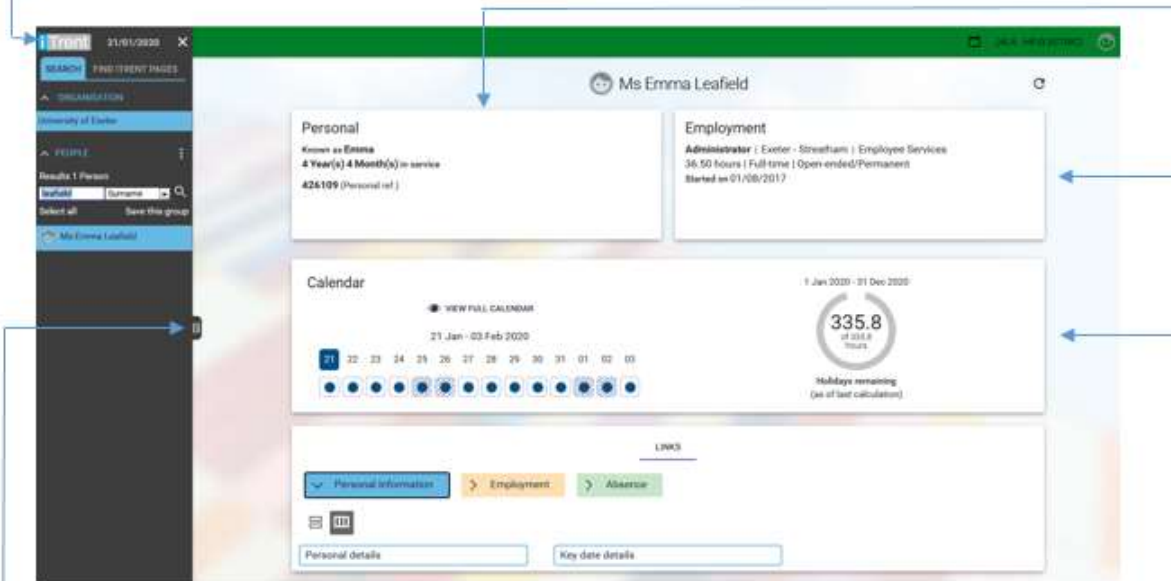


Person search Click on this link to find the individual you need to look up.

Useful links In addition to the helpful links that appear within the company news slides this provides you with additional links such as Annual leave policies and HR contacts.

Once you click on the **Person search** link you will be prompted to enter the name of an individual in your area after which you will be presented with the following view:

Clicking on the **iTrent** logo at the top left corner at any point will take you back to the front page shown above



These sections give a summary of personal, employment and absence details.

Clicking on will expand the search pane to show more details

The final section headed 'Links' gives you access to further details.



Depending on which link you've clicked on will depend on what screens are available. In the example above the fields in the white boxes are what's available within the **Absence** area. If you click on the other coloured links it will open up other screens for viewing.

Amending Annual Leave records

Although staff have the ability to delete and amend annual leave dated in the future they are unable to amend any dates in the past. Should there be a need to delete or amend dates for annual leave in the past the Annual Leave Administrator can do this via the **Absence** section.

Once in this area you can view annual leave dates in the past and future, delete or amend holiday dates, enter a new holiday period for an individual at their request if their access to Trent is limited and apply an adjustment to their annual leave record.

Adding and deleting leave is straightforward by clicking on ‘Holiday absence details – New’ or ‘Holiday absence details’ but applying adjustments is a little more complex. Some examples are shown below. NB the annual leave is recorded in hours as a decimal figure.

The following example shows an individual’s annual leave entitlement – you can see that their standard leave is 299.3 hours plus 36.5 hours which have been brought forward from the previous year giving a total of 335.8 hours. The only leave dates listed are the bank holidays for the year.

Holiday entitlement summary
MENU

Employment details

Position **Administrator**

Period details

Holiday period dates **01/01/2020 - 31/12/2020**

Length of service at relevant date **4 year(s) 4 month(s) 8 day(s)**

Scheme name **Annual Leave Hours**

Membership dates **24/08/2015 -**

Entitlement for period **335.8 hours (299.3 hours Pro Rata) (36.5 brought forward)**

From	To	Duration	Remaining entitlement
01/01/2020	01/01/2020	7.3	328.5
10/04/2020	10/04/2020	7.3	321.2
13/04/2020	13/04/2020	7.3	313.9
08/05/2020	08/05/2020	7.3	306.6
25/05/2020	25/05/2020	7.3	299.3
31/08/2020	31/08/2020	7.3	292
25/12/2020	31/12/2020	36.5	255.5

Example 1 – Reducing/increasing the entitlement:

The line manager contacts you to say that the 36.5 hours should not be brought forward from the previous year.

ACTION – Find the individual and click on Absence>Holiday entitlement adjustment.

Holiday entitlement adjustment ▼ MENU 🔄 🖨️ 🔒

Employment details

Position **Administrator** ▼

Period details

Holiday period dates **01/01/2020 - 31/12/2020** ▼

Scheme name **Annual Leave Hours** ▼

Entitlement for period **299.3 hours (299.3 hours Pro Rata)**

Brought forward **36.5**

Brought forward not used (lost)

Adjustment details

Adjustment type **Standard** ▼

Entitlement **Standard**

Adjust

Override

Under Adjustment type' select 'Adjust' from the list of values (see above).

Within the 'Value' field you need to enter -36.5 and enter an explanation for the adjustment under 'Reason'. The 'End date' field should remain unchanged. Click on SAVE.

Upon clicking save it will complete the remaining fields – Date entered, User name, entitlement. It also creates a new line in case of any future changes required in the year (see below).

Holiday entitlement adjustment ▼ MENU 🔄 🖨️ 🔒

Employment details

Position **Administrator** ▼

Period details

Holiday period dates **01/01/2020 - 31/12/2020** ▼

Scheme name **Annual Leave Hours** ▼

Entitlement for period **299.3 hours (299.3 hours Pro Rata)**

Brought forward **36.5**

Brought forward not used (lost)

Adjustment details

Adjustment type **Adjust** ▼

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
21/01/2020	CDDOLBY	-36.500	As req'd by line manager.	31/12/2020	299.3 hours	+	-
				31/12/2020		+	-

If you are asked to *increase* their entitlement you following the same steps but just leave out the minus/- (see example below increasing the entitlement by 5 hours):

Adjustment details

Adjustment type Adjust

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
21/01/2020	CDDOLBY	5.000	Additional agreed hours	31/12/2020	340.8 hours	+	-
				31/12/2020		+	-

Example 2 – Overriding entire balance:


There are cases where it is required to *override* an individual’s holiday entitlement because iTrent is unable to calculate their leave due to the individual holding a non-standard contract. For example staff who work shift rotas exceeding 36.5 hours per week. In these cases it may be necessary to completely override the iTrent annual leave calculation and replace it with the correct figure. In these cases the ‘Override’ option should be selected and the total annual leave entitlement entered – see example below:

Adjustment details

Adjustment type Override

Date entered	User name	Value	Reason	End date	Entitlement	Remove
21/01/2020	CDDOLBY	310.500	Correct AL entitlement fo	31/12/2020	310.5 hours	-

Switching roles and logging out of iTrent

If you have more than one iTrent role you can click on  in the top right-hand corner of the screen and this will list the other roles available to you or give you the option to log out.

Further advice/guidance

If you have any queries or need further assistance or guidance please contact humanresources@exeter.ac.uk in the first instance.