# Hints & tips when using the iTrent electric theme

Depending on what kind of role you hold within the University will depend on who and what information you can see in iTrent. This information includes some sensitive details and it is important that you use it responsibly to ensure that the security of employees' details are 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 the appropriate role from the drop down). A screen similar to the following will open (the list of options will vary depending on the role):
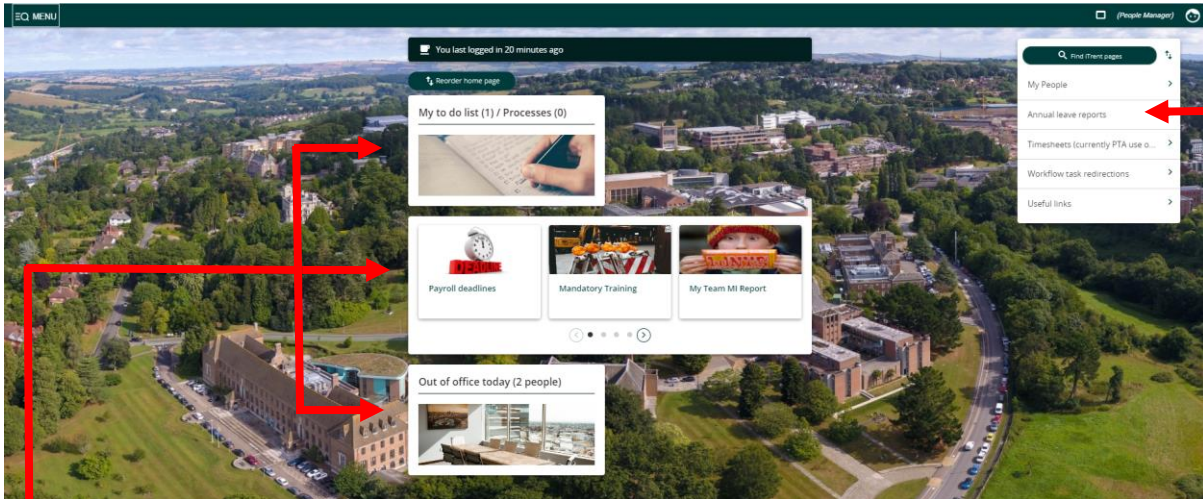

Links to specific areas eg People data, Annual leave reports, PTA timesheets and Useful links.

Company news – links to My to do list (for annual leave and timesheet approval), mandatory training, MI reports and out of office notifications.

If searching for an individual you should select 'My People' or 'People' (terminology depends on iTrent role).

The search will only bring back current members of staff. If you wish to include leavers or do an advanced search you will need to click on the ⋮ (see below, circled in red).
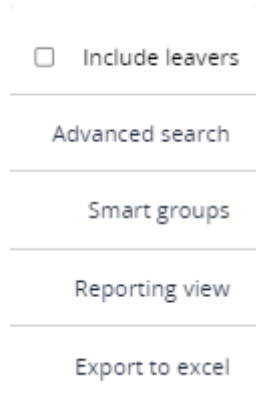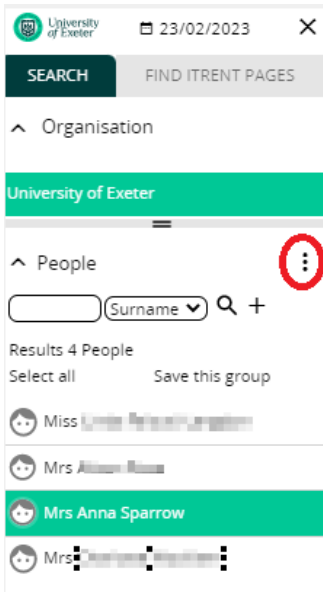
Clicking on the ⋮ will open this box

Clicking on the ⋮ allows further functionality eg include leavers in your search, apply an advanced search, export to excel (see below for further details).

Once you've identified the individual you wish to look up you will see the following employee summary screen:

Clicking on the [University of Exeter logo] logo at the top left corner at any point will take you back to the front page shown above.

Clicking on ☐ will open a new view which you can switch between.
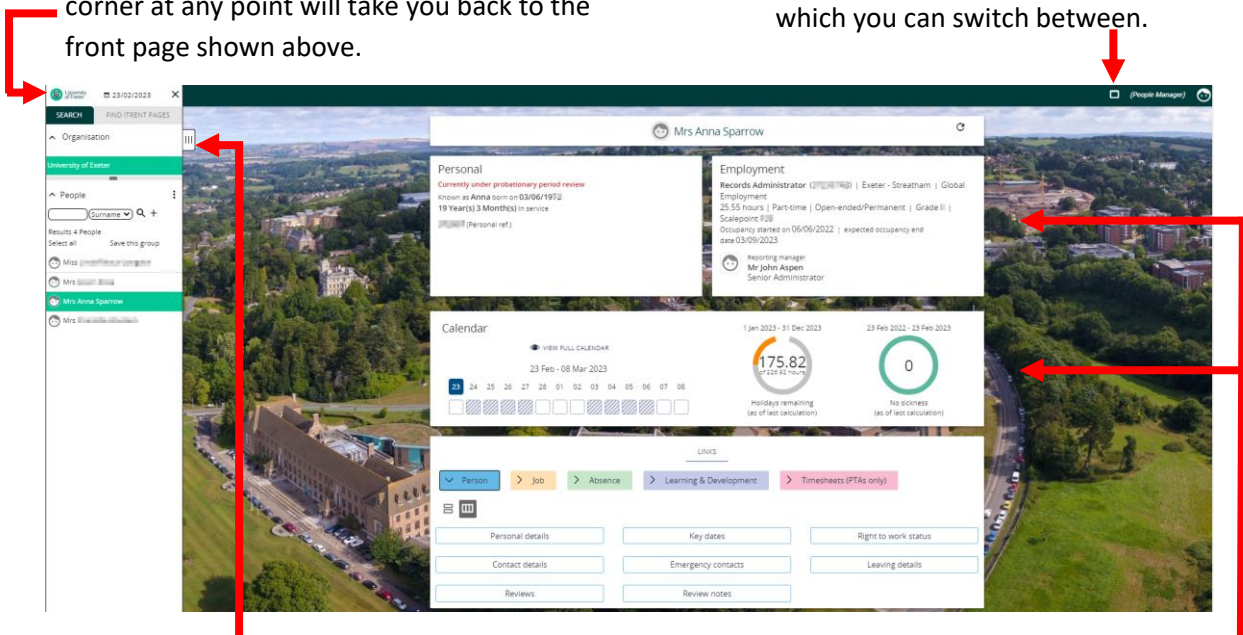
These sections give a summary of personal, employment and absence details.

Clicking on ⊞ will expand the search pane to show more details.

The section headed '**Links**' at the bottom of the screen gives you access to further details.

Which link you've clicked on will determine what screens are then available. In the example above the fields in the white boxes are those available within the ⌄ **Person** area.

If an employee has multiple positions, current or historic, a list of positions will flash prompting you to select the appropriate position. If you wish to see more details e.g. position start and end dates, you can click on the ⊞ which will expand the section. To reduce the section you will need to click on the ⊞ again.

When clicking on any date sensitive screens you will be prompted to enter an effective date.
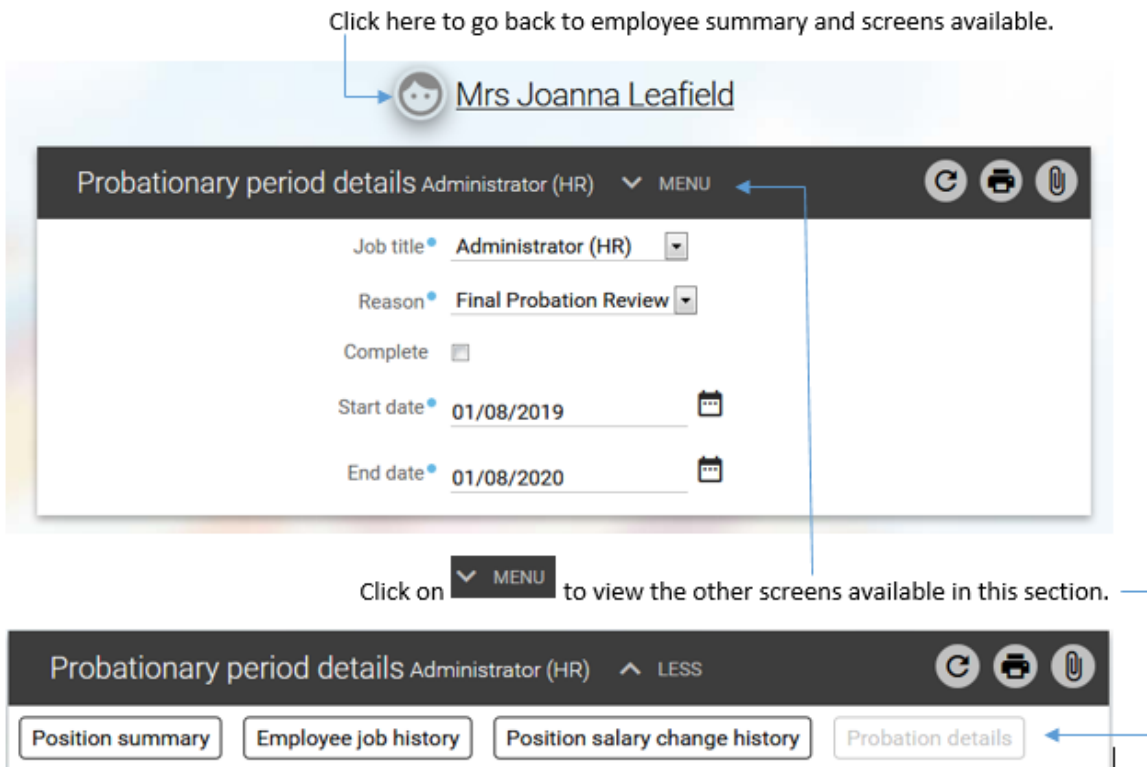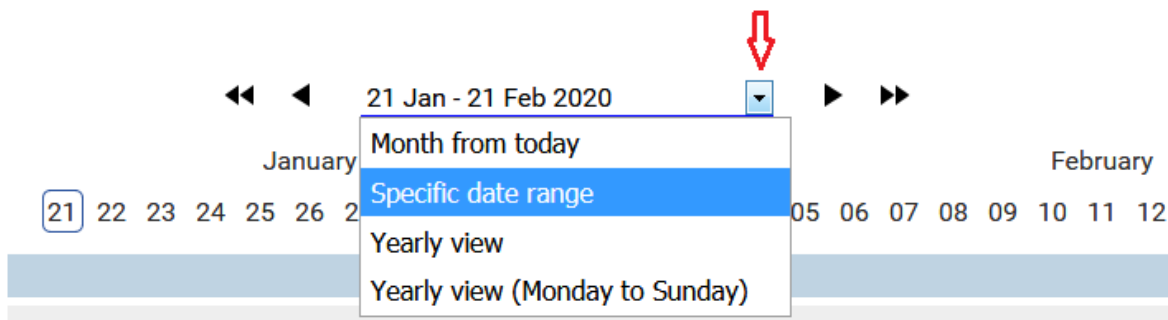
Calendar Section (where available)

Click on 'VIEW FULL CALENDAR' (circled in red below) to view the calendar in detail:
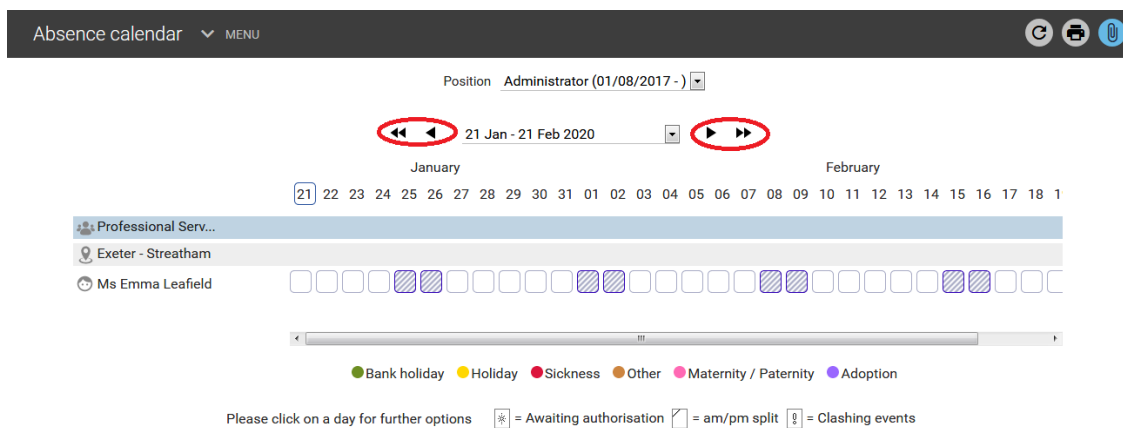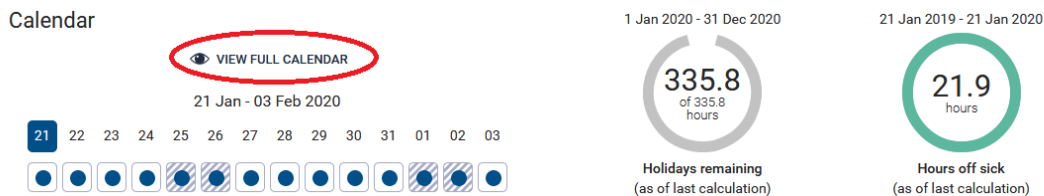
If you click on either of the arrows circled in red above it will expand the calendar period. The single arrows by a month and the double arrows by 3 months.

Alternatively you can click on the down arrow and it will give you additional options.


If you wish to view the calendar for multiple people you can either use the 'Select all' function or use the Ctrl key.

The items available in the Calendar section can be amended under User Preferences which can be found under the icon.

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.

Exporting to excel

If you wish to export any of the search results to excel you can do so by selecting 'Export to Excel' via in the search panel. This will automatically save it as a csv file. Open the spreadsheet and follow the instructions below:

- ➢ Highlight the first column and select 'Text to columns' within the excel Data tab.
- ➢ Select 'Delimited'
- ➢ Click on Next
- ➢ Ensure the 'Comma' box is ticked
- ➢ Click on Next
- ➢ Click on Finish
- ➢ Save as an .xlsx file.