

# iTrent Self Service User guide

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## Welcome

This is the User Guide for iTrent Self Service. Self Service is a tool that allows all University of Exeter staff to view and, in some cases, update some of the information that the University's Human Resources database, iTrent, holds on you and your position.

**To log in to the iTrent Self Service system, click [here](#)\***.

**Use your University username and password to log in.**

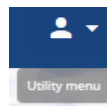
***[iTrent Self Service is available on all mobile devices](#)***

***\*Please be aware that you will need to connect to VPN and MFA if you are off campus and wish to access [iTrent Employee Self Service](#). Guidance can be found online [here](#). You should contact the [IT Service desk](#) if you require any additional support.***

### IMPORTANT SECURITY ADVICE

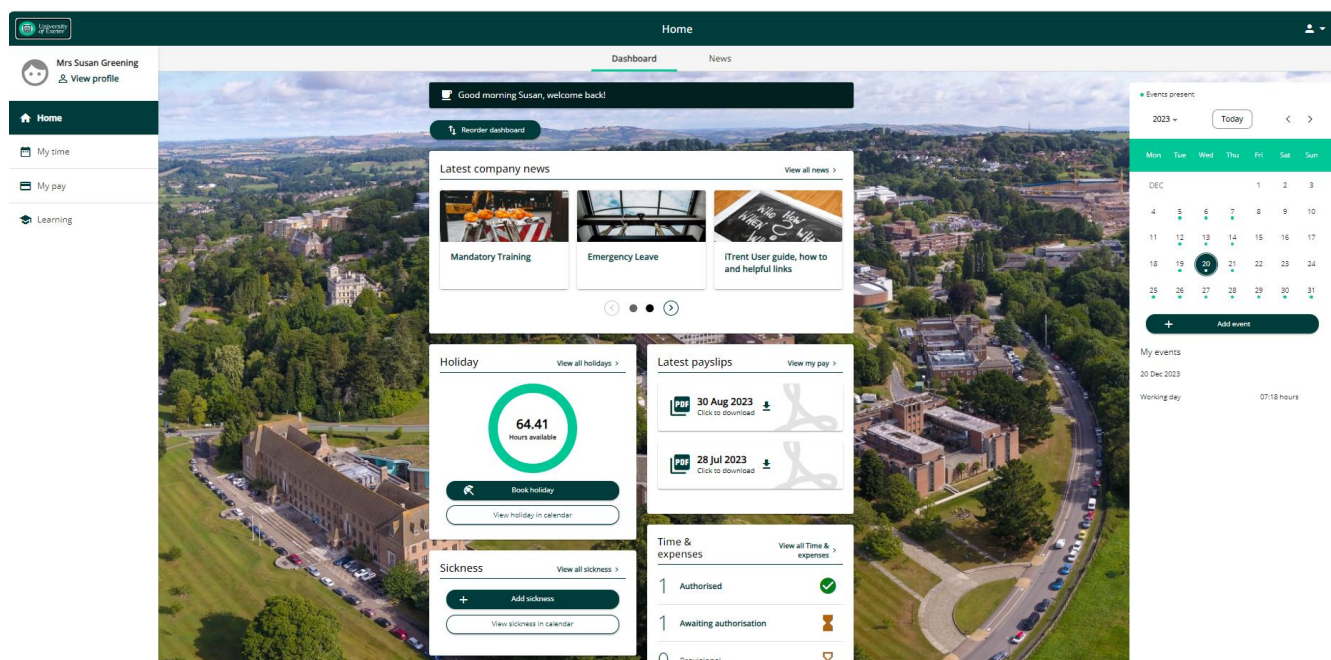
As this Self-Service system includes some very sensitive information about you it is important that you use it responsibly to ensure that the security of your personal information is maintained. You should therefore always log out of Self Service once you have finished using it and should never let anyone know your University username & password.

To log out of Self Service always click on 'Sign out' which can be found in the Utility menu in the top right-hand corner. Alternatively, please ensure you close the browser or tab as this will log you out automatically.

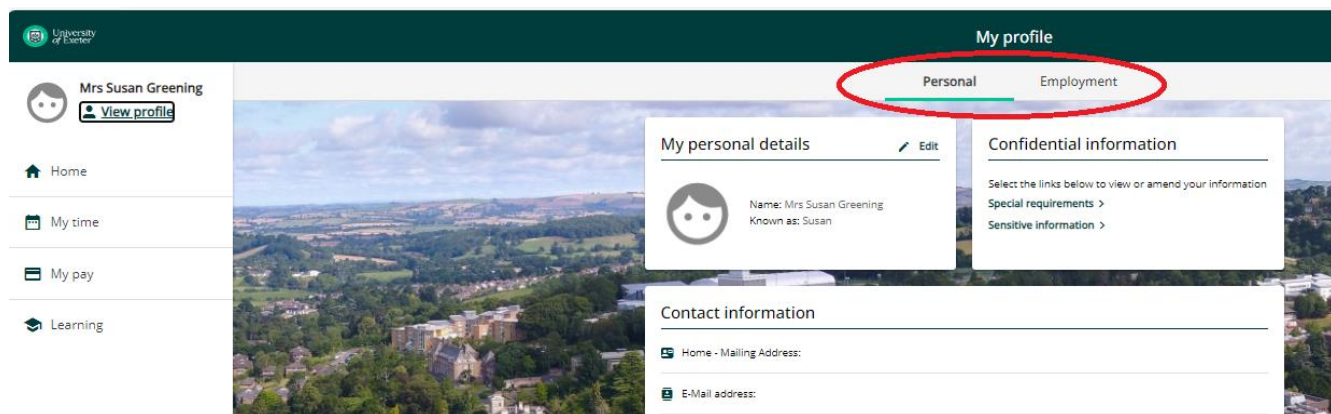


# Navigation of iTrent Self Service

When first logging into iTrent Self-Service you will be met with the Home screen which brings together news and useful information, absence details and access to viewing payslips.



Under most sections you will find two “tabs” available to you (see below circled in red)



For example, if you click on [View profile](#) (top left-hand corner) it automatically opens on the ‘Personal’ tab where you will find contact details, emergency contacts and sensitive information, but you can also click on the ‘Employment’ tab and you will have access to your current employment, ability to update your academic teaching qualifications, previous employment and add ORCID for academic staff.

Further details on the sections and tabs available to you are set out below. By clicking on these different sections, you can view and amend a variety of details.

**View profile** -  View profile

**Personal** - Your personal details and contact information can be amended here, e.g. change address and update sensitive information which allows us to monitor Equality and Diversity information.

**Employment** - This will show your current position plus qualification details held within HESA details. If any details of your current position are incorrect you should ask your Reporting Manager to advise Human Resources by emailing [humanresources@exeter.ac.uk](mailto:humanresources@exeter.ac.uk).

**Home** -  Home

**Dashboard** - brings together news and useful information, absence details and access to viewing payslips.

**News** - Links to news and useful information

**My absence** -  My absence

**Overview** - This area allows you to enter and amend holiday bookings, sickness and other leave. For details on how to book and view annual leave click [here](#).

**Calendar** - This area shows you a calendar view of your working pattern and any absences.

**My Pay** -  My pay

**My Pay** - For viewing and downloading Payslips and P60's.

**Benefits** - For purchasing annual leave.

**Learning** -  Learning

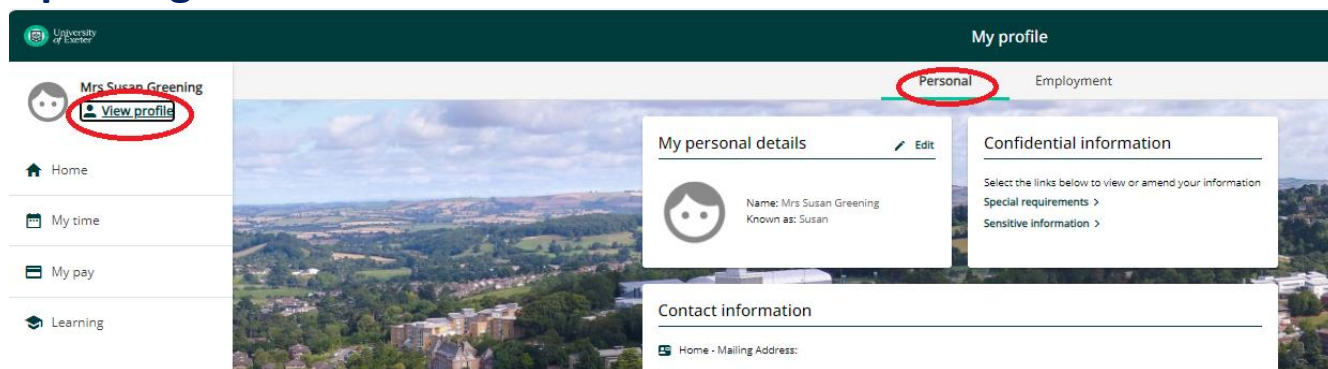
**Courses** - For searching and booking onto Learning Events. For details on how to book courses click [here](#).

**My activities** - Any training that has been undertaken or booked will show here plus the ability to add personal learning records.

**Tasks** -  Tasks

This allows for any Managers to approve absence or learning requests via ESS rather than logging into People Manager.

# Updating Personal Details



Go to 'View profile' (circled in red above)

Whilst on the 'Personal' tab this screen shows your personal information and contact details including emergency contacts.

## Updating your address, contact details or emergency contacts

To change your address or add contact details, including emergency contacts, simply click on the relevant link:



## Changing your name on iTrent

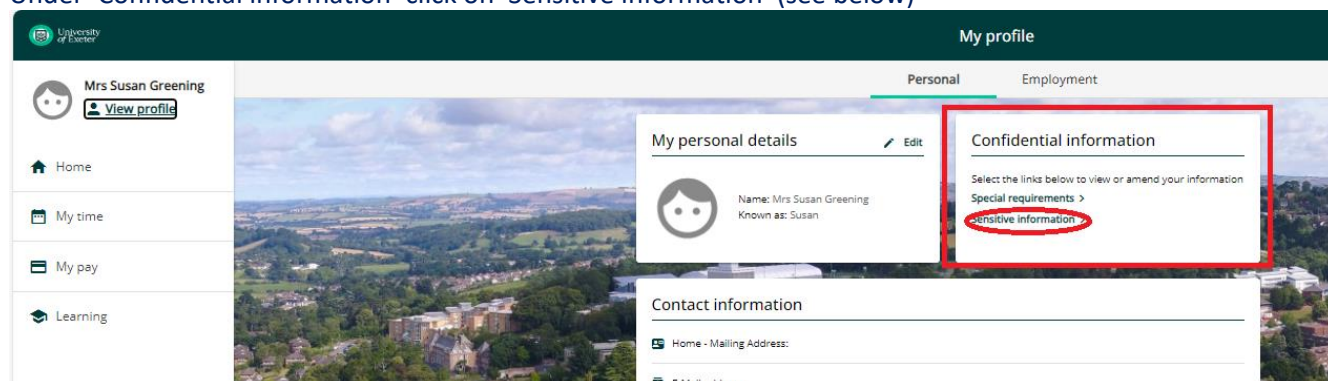
Within iTrent you can amend your Preferred name, Title and Previous surname only. If you need to change your surname and/or forenames, you will need to contact [humanresources@exeter.ac.uk](mailto:humanresources@exeter.ac.uk) who will advise you on what official documents are required to support the name change.

Once you have notified Human Resources of your new name this information will automatically feed through from iTrent and update your email address. NB This does not happen immediately.

If you would like to keep your University e-mail address despite your name change you will need to log an enquiry with [IT Services](#) after it has been updated on iTrent.

## Checking/updating your sensitive information

Under 'Confidential information' click on 'Sensitive information' (see below)



The personal data that you enter on this screen is voluntary, if you do provide the information requested, we will only use this in an aggregated and anonymised form.

# Viewing details of your current job

The screenshot shows the 'My profile' page for Mrs Susan Greening. The 'View profile' link is circled in red. The 'Employment' tab is also circled in red. The page displays a table of employment details and a section for additional information.

Period of employment	Position	Department
01 Sep 2018 - present	Administrator	HR Partnering

**Additional employment information**

HESA details: Last updated on 23 Aug 2023 [View or amend HESA details >](#)

Go to 'View profile' and click on the 'Employment' tab (circled in red above).

This screen shows your current job, additional employment information and gives access to any forms and surveys.

If you click on your job title within the 'Current job' section it will open details of your job including salary, hours of work, working pattern, reporting manager and work address.



# Updating additional employment information including academic teaching qualifications, awards and multiple disabilities

The screenshot shows the 'My profile' page for Mrs Susan Greening. The 'View profile' link is circled in red. The 'Employment' tab is selected. The 'Current job' section shows 'Period of employment' as '01 Sep 2018 - present', 'Position' as 'Administrator', and 'Department' as 'HR Partnering'. The 'Additional employment information' section has a link 'Update/record qualifications, awards and multiple disabilities >' circled in red.

Go to 'View profile' (circled in red above)

Whilst on the 'Employment' tab click on the 'Update/record qualifications, awards and multiple disabilities' under the 'Additional employment information' section.

## ACADEMIC TEACHING QUALIFICATION

You can enter up to 6 Academic Teaching Qualifications.

Please note that if you hold no academic qualifications this option is available and should be entered.

A full list of available options is shown below:

- Accredited as a teacher of their subject by a professional UK body
- Holder of a National Teaching Fellowship Scheme Individual Award
- No academic teaching qualification held
- Other UK accreditation or qualification in teaching in the HE sector
- Overseas accreditation or qualification for any level of teaching
- PGCE in HE, secondary education, further education, life-long learning or equivalent
- Recognised by Advanced HE as a Fellow/Principal Fellow/Senior Fellow/Associate Fellow
- Recognised by SEDA against Descriptor 1 or 2 of the UKPSF

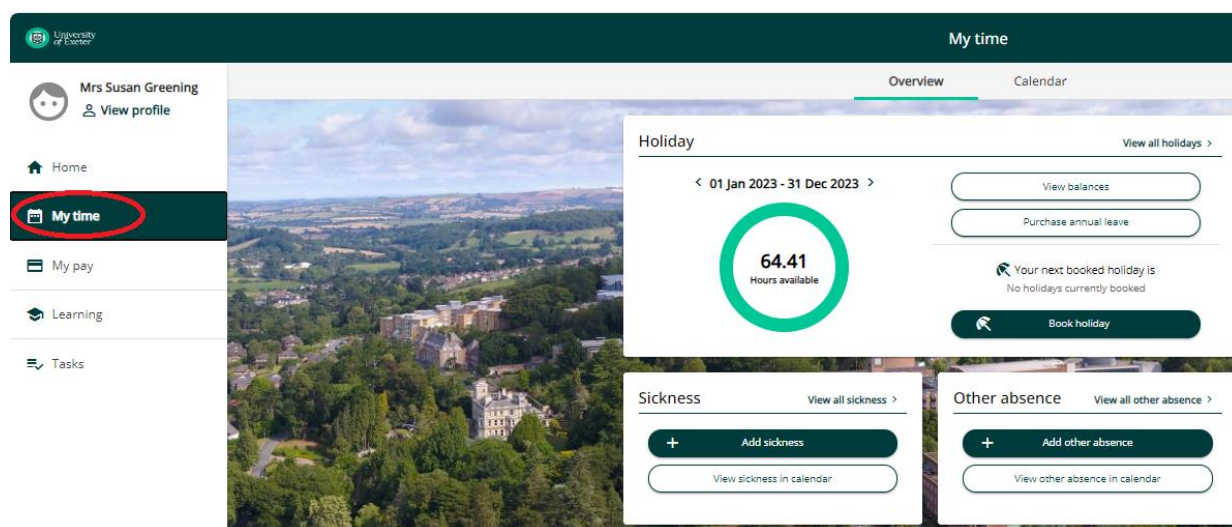
## MULTIPLE DISABILITIES

You can select up to 9 disabilities.

# Absences

## Viewing Absence Dates

(inc holidays, sickness and other leave, e.g. compassionate, emergency and industrial action)



Go to 'My time' (circled in red above)

This screen allows you to view annual leave balances and scheduled dates (View all holidays), request annual leave, purchase annual leave, record sickness and other leave such as compassionate, emergency and industrial action.

This includes annual leave both 'authorised' and those 'awaiting authorisation' where the request has not yet been approved by your Reporting Manager.

From this screen you can click any future periods of leave and either change the dates or delete it (unless the *Authorisation* status is 'Authorised').

If you need to amend or delete a leave booking that took place in the past (for example, if you accidentally selected the wrong month or year), you should ask your manager to contact either the Annual Leave Administrator for your Faculty/Service for holidays, or [humanresources@exeter.ac.uk](mailto:humanresources@exeter.ac.uk) for all other absences.

When you book, amend, or cancel a period of annual leave, you will receive a confirmation via email. Your Reporting Manager will also receive a notification via email to authorise, reject or put your request on hold. Once your Reporting Manager has changed the status of your annual leave request (i.e. authorised, rejected, or placed it on hold), you will receive another confirmation via email.

### Booking annual leave or requesting other leave

Click on the section  My time

To request annual leave or to report sickness, emergency leave or industrial action click on the relevant link:



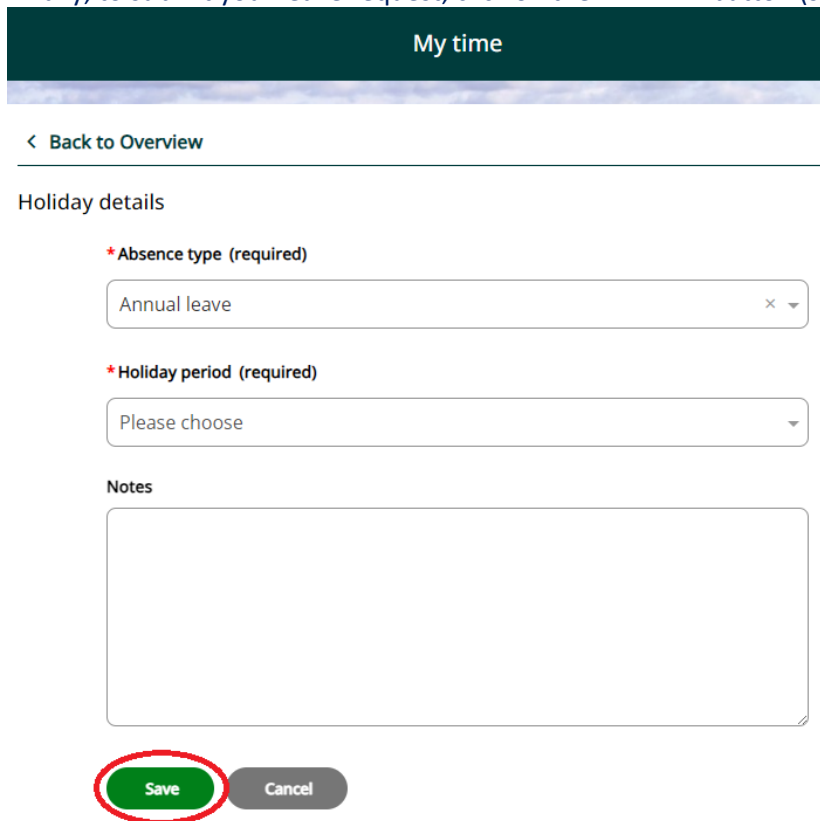
**Absence period:** There are various options 'Full day' or 'More than one day' plus an additional option of 'Part day' for annual leave. Depending on which one you choose, other context-sensitive menus may appear.



- **Part day:** (for annual leave and sickness only): This option allows you to request part of a single day's annual leave or report part of a single day's sickness. If you select this, you will be prompted for the Start Date and another menu ('Morning or afternoon') will appear. To request/report a half day's absence, select 'Morning' or 'Afternoon' from this menu.
- **Full day:** This option allows you to request/report a full single day's absence. You will be prompted for the Start Date.
- **More than one day:** This option allows you to request/report one or more consecutive full days' leave. If you select this, you will be prompted for the start and end dates of your leave.

Use the 'Notes' field to add any extra information relating to your absence. Your Reporting Manager will be able to read this information when they receive notification of your absence.

Finally, to submit your leave request, click on the  button (see below):



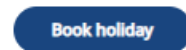
If you have more than one position an additional box will appear –

\*Position (required)



If you wish to book leave in only one position you should select the appropriate position from the drop down.

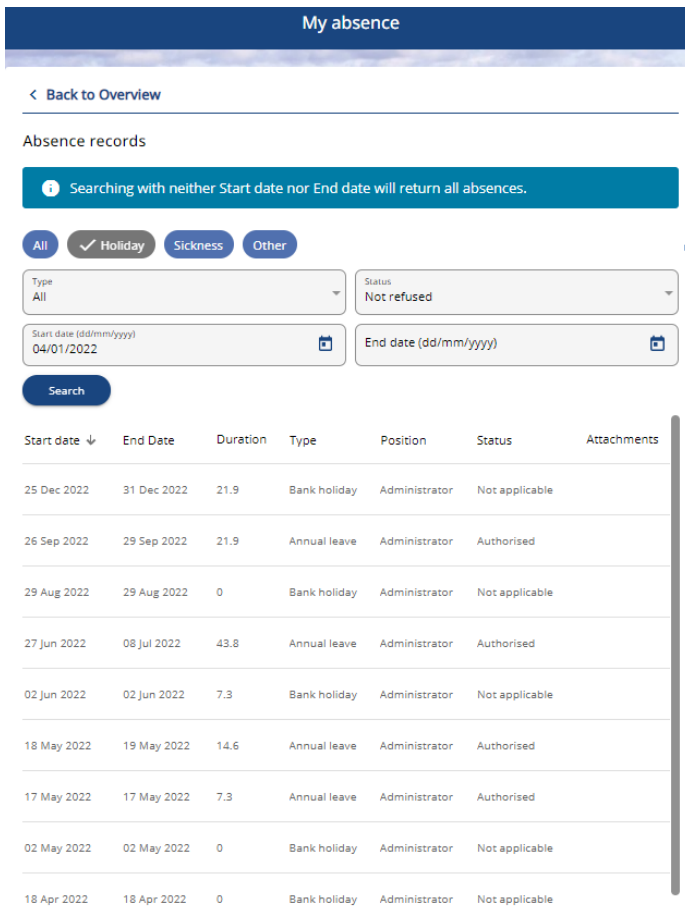
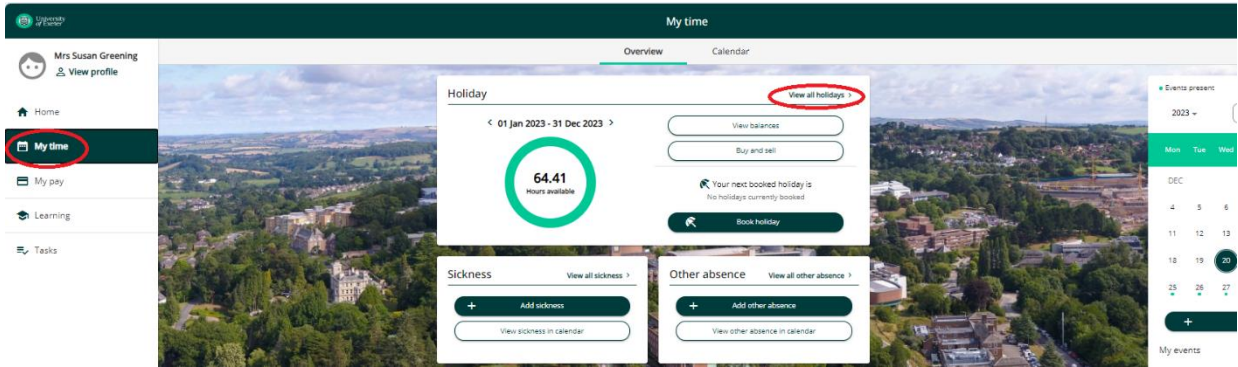
For Annual leave there is an option to book further leave by clicking on



You will receive a confirmation via email and your Reporting Manager will also receive a notification via email to authorise, reject or put your request on hold. Once your Reporting Manager has changed the status of your leave request (i.e. authorised, rejected, or placed it on hold), you will receive another confirmation via email.

## Viewing scheduled holiday dates

Whilst in the 'My time' section click on the link 'View all holidays' (see below circled in red):

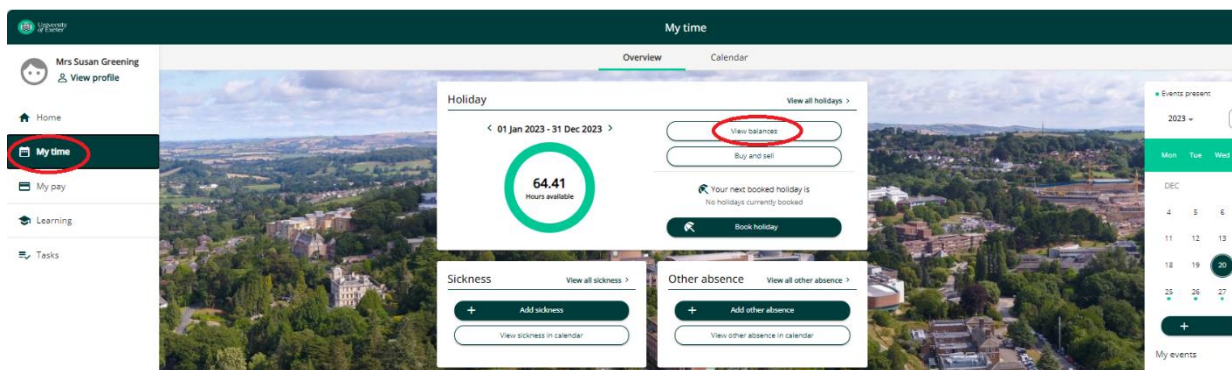


Using the filters this screen allows you to view the dates of holidays, bank holidays, sickness and other leave.

Against any annual leave bookings/requests it will also show the Status, i.e. whether it's awaiting authorisation or authorised (bank holidays will show as 'not applicable').

## Viewing holiday balances

This screen allows you to view your total and outstanding annual leave entitlement by year. From the Home page click on 'My time' followed by 'View balances' (see screenshot below):



The balances screen shows the following information:

**Holiday balances**

The balance takes account of all recorded holidays (including any awaiting authorisation), bank holidays and closure days

**Administrator**

	Scheme name Annual Leave: 2021 onwards	Holiday period 01 Jan 2021 - 31 Dec 2021	Calendar year to which the annual leave figures on this screen relate.
Entitlement for holiday period (pro rata where part-time)	Entitlement 245.28 hours	Taken 201.4 hours	Number of hours taken incl of bank holidays and univ closure days.
Number of hours scheduled incl of bank holidays and univ closure days.	Scheduled 0 hours	Balance 43.88 hours	The number of hours remaining of discretionary leave.

Your annual leave entitlement is calculated using the Contractual Hours and Working Pattern information recorded on the Current Jobs screen under 'View Profile>Employment'. You must ensure this information is accurate (Please see 'Annual Leave – Checking your Details' below for more information about how to do this).

The hours and days recorded will determine what is deducted from your leave entitlement. For example, someone is employed on a 0.6 FTE contract and works a standard 7.3 hour day on Monday, Wednesday, and Friday each week. If they request annual leave from Monday to Thursday, their annual leave balance will be reduced by a total of 14.6 hours (2 days), i.e. Monday and Wednesday. The annual leave system will ignore Tuesday and Thursday as they are not contracted to work on these days and therefore do not count towards your annual leave entitlement.

Where a Bank Holiday and Closure Day falls on a day you are contracted to work, the number of hours you were contracted to work that day will be deducted from your total leave entitlement. If a Bank Holiday and Closure Day falls on a day you were not contracted to work, no deduction is made.

## Annual leave - Checking your details

If you think that your annual leave has not been calculated correctly you should start by checking that the information held about you and your position are correct.

Click on 'View profile' and select the 'Employment' tab. Select your position under the 'Current job' section.

**Current job details**

**Job details**

<b>Department</b>	<b>Position name</b>
Employee Services	Administrator
<b>Start date (dd/mm/yyyy)</b>	<b>Payroll reference</b>
01/09/2018	50335
<b>Contractual hours</b>	
21.90	
<b>Salary</b>	
Grade E point F31 - Current annual rate of pay is £ 35326 (pro rata based on 0.6 FTE: £ 21195.6 )	
<b>Work pattern</b>	
21:54 M0 T7:18 W7:18 T7:18 F0 S0 S0	

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**Manager**

**Reporting manager and job title**

Vacant - Reporting Position

On the Current Job details screen, check that your Reporting Manager, Contractual Hours and Working Pattern are correct.

When you request annual leave, it is important that these details are up to date because:

- Your Reporting Manager is responsible for authorising your annual leave request. If this is not correct, your request will not be sent to the right person
- Your Contractual Hours are used to calculate your total available annual leave
- Your Working Pattern is used to calculate the entitlement deduction of each period of absence

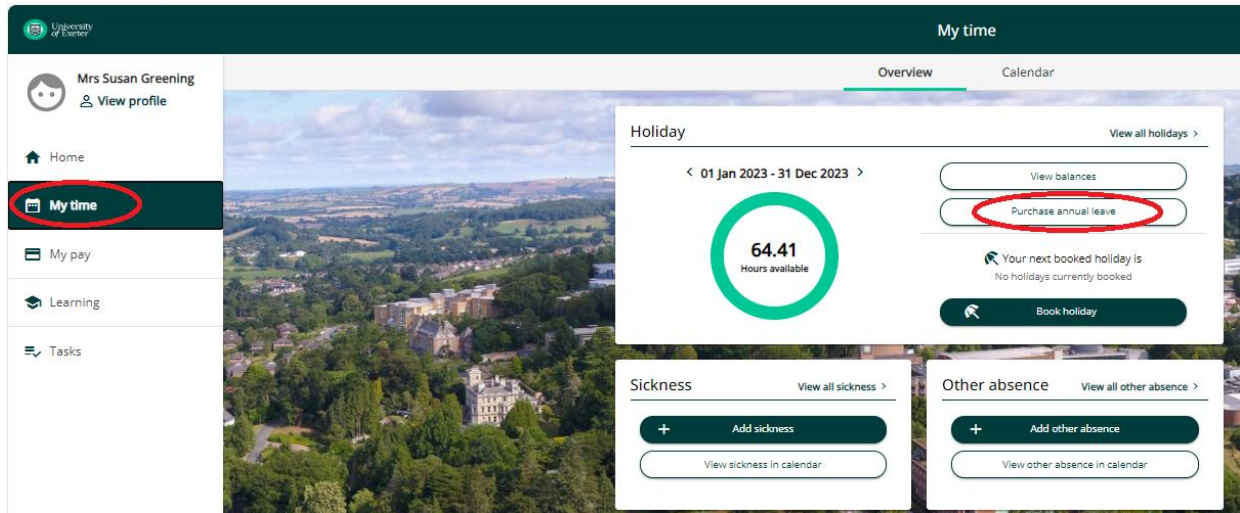
All the information held in Self Service about your current jobs is read only; therefore, if you find that any of the information held in this section is incorrect, then you should ask your Reporting Manager to email the [HR Admin Team](#).

## Annual leave – Purchase of additional annual leave

For further information on the Purchase of additional leave policy, please refer to the pages on our [website](#).

### Purchasing additional annual leave

From the home page, Go to 'My time' (circled in red below) and click on 'Purchase annual leave' (also circled in red):



On the next page, input the following information:

- Position name (the position you would like to purchase leave for)
- Scheme ('Annual leave: 2021 onwards')
- Holiday period dates (the year you would like to purchase leave for)
- No of hours requested (the amount of hours you would like to purchase, minimum 1, maximum 73)

Click on 'Save'



University of Exeter My pay

< Back to Overview

Purchase annual leave

\* Position name (required)  
 Test Position (07/11/2022, P84144) (Current) x

\* Scheme (required)  
 Annual Leave: 2021 onwards x

\* Holiday period dates (required)  
 01/01/2023 - 31/12/2023 x

Benefit window is open from 01/11/2022 to 02/12/2022

\* Action (required)  
 Buy x

Minimum hours/Maximum hours allowed  
 1 / 73

\* No of hours requested (required)  
 36.5

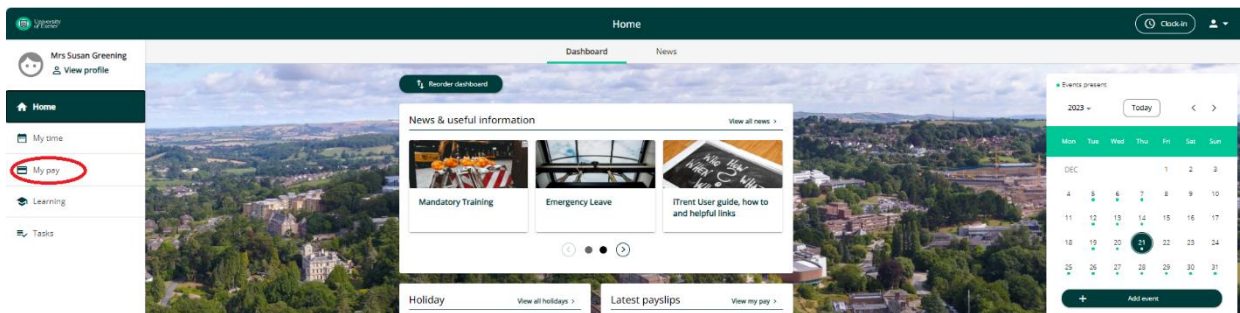
Total value  
 569.6

Save Cancel

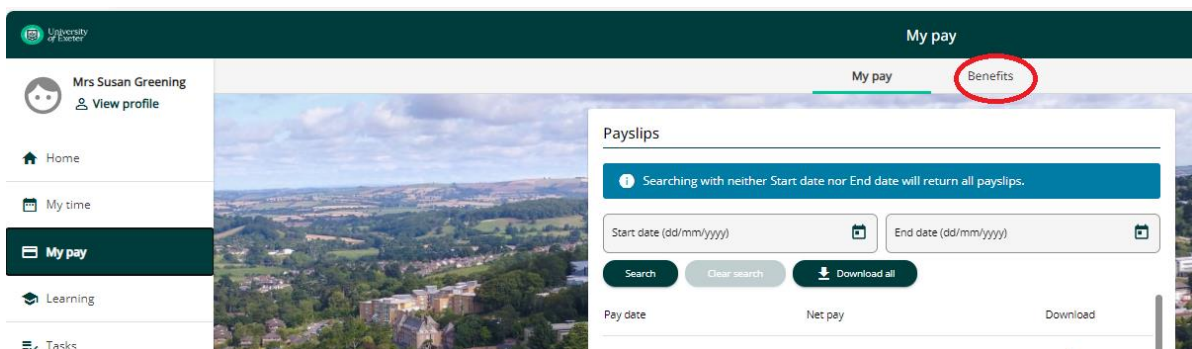
**If you need to amend your request**

If you need to amend your request, you must first delete this request and then re-apply to purchase additional leave.

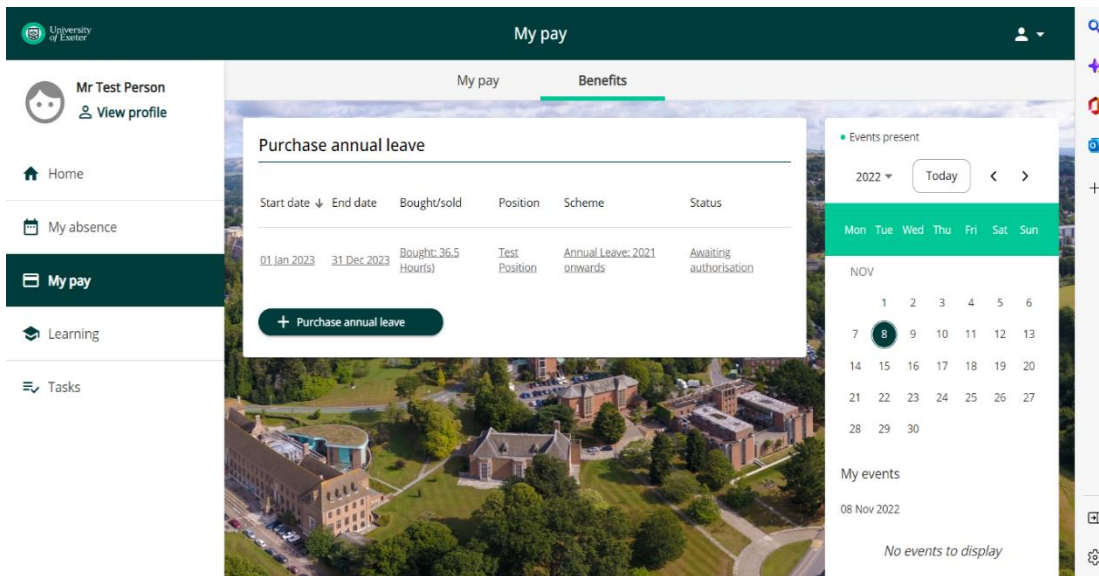
From the home page, click on 'My pay' (circled in red below)



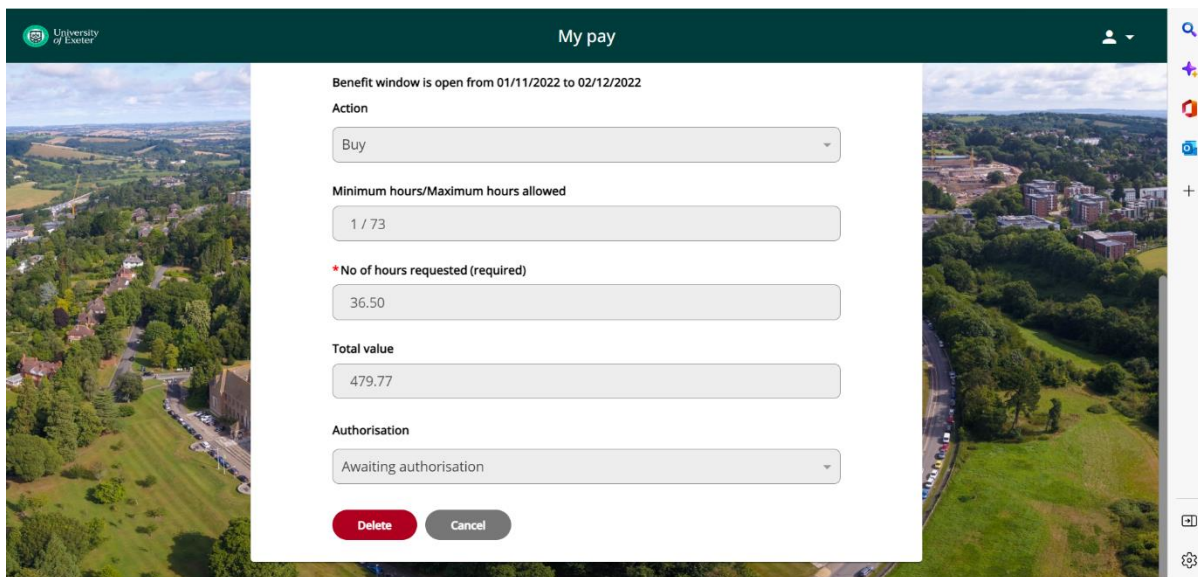
Click on 'Benefits' (circled in red below)



Select the relevant request



On the following page, scroll down to the bottom and click 'Delete'



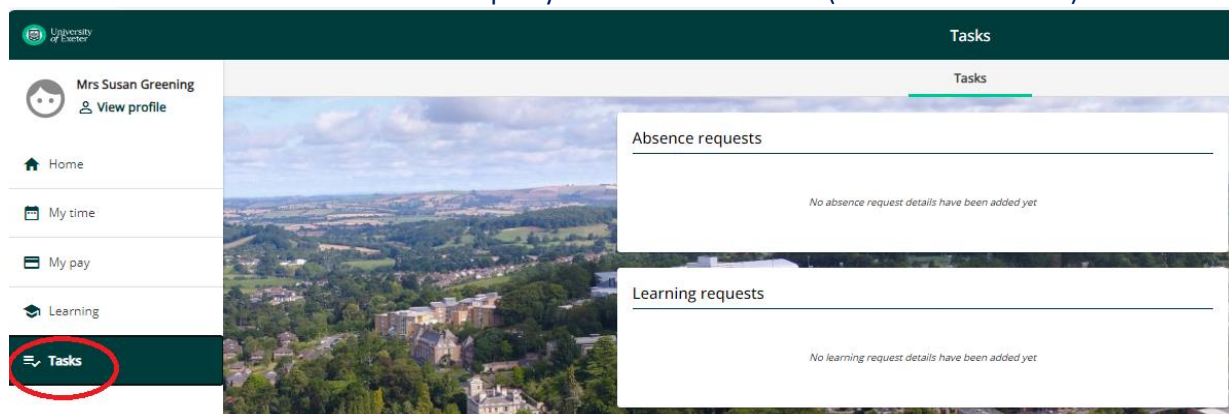
If amending your request, you will then need to re-apply to purchase additional leave. Please refer to the [Purchasing additional annual leave](#) section for further information.

### Once the request has been approved

Where approved, the leave entitlement will be added to the employee's annual leave entitlement on iTrent and the employee will need to request the leave via iTrent as per normal annual leave application. Please refer to the [Booking annual leave or requesting other leave](#) section for further information.

## Approving annual leave requests via self-service (for Managers only)

Click on the tab labelled 'Tasks' at the top of your iTrent Self-Service (circled in red below):



Once you have selected a request you will be taken into a screen where you should select either 'Authorise' or 'Reject' within the 'Action' field and press SAVE. An email confirming the status of the request (i.e. authorised or rejected), will be sent to the employee via email.

### FAQs - Annual Leave

**Please note: This section only applies to staff who book annual leave using iTrent Self Service**

- [I haven't requested any annual leave for the new leave year but iTrent says that I have 'scheduled' 80.3 hours.](#)
- [I am part-time and I don't understand the leave entitlement shown in iTrent.](#)
- [I work part-time, Monday to Wednesday: what happens when a Bank Holiday falls on a Monday?](#)
- [I work part-time and part of my working hours are flexible.](#)
- [I have two part-time jobs with the University: how do I book my annual leave?](#)
- [I work mornings only: how do I book one morning as annual leave?](#)
- [I am leaving my job in the Faculty of X to start another job in the Faculty of Y on 1 June 20XX: what happens to my annual leave?](#)
- [I started working for the University part way through the holiday year: how does iTrent calculate my leave entitlement?](#)
- [I am employed on a fixed term contract until 30 September, but iTrent says I have a full year's leave entitlement.](#)
- [What happens to my leave if I haven't used all of it by 31 December?](#)
- [I joined the University before 1999 and have some 'banked leave': is this recorded in iTrent?](#)
- [I work term-time: why can't I see my annual leave in iTrent SelfService?](#)
- [I was sick while on leave, what should I do?](#)
- [What happens if I try to book more annual leave than I have left in my balance?](#)
- [I have requested by final 'full day' of annual leave for the current leave year but iTrent shows I have an untaken leave balance of 0.3 hours – what does this mean?](#)
- [My job with the University requires me to work on a Bank Holiday: how does iTrent deal with this?](#)
- [I don't have a regular working pattern. Can I use iTrent to record annual leave?](#)

**Q - I haven't requested any annual leave for the new leave year but iTrent says that I have 'scheduled' 80.3 hours.**

A – These are in respect of bank holidays and closure days that fall on your working days, pro rata for part-time staff.

Further information about Bank Holidays and University Closure Days can be found at:  
<http://www.exeter.ac.uk/staff/employment/leave/annual/>

**Q - I am part-time and I don't understand the leave entitlement shown in iTrent.**

A - Your annual leave entitlement, inclusive of bank holidays and closure days, will be calculated as follows:

- staff in grades A to D: 284.7 hours multiplied by your FTE (eg 0.5 for half-time)
- staff in grades E and above: 299.3 hours multiplied by your FTE (eg 0.5 for half- time)

iTrent will then look at your working pattern to see which bank holidays and closure days fall on days when you would normally work and deduct this from your leave 'balance' so that the figure shown as 'Balance' in the 'Holiday Balances' screen at the beginning of each year, (before you have entered any leave requests) shows how many hours can be taken by agreement between you and your manager.

All staff should check that the 'work pattern' in iTrent (go to 'View Profile' select 'Employment' tab and click on the job title of your current job) correctly records their days and hours they work each day.

**Q - I work part-time, Monday to Wednesday: what happens when a Bank Holiday falls on a Monday?**

A - Bank Holidays and University Closure Days are pre-loaded into iTrent. When a Bank Holiday or Closure Day falls on a day you normally work and you do not work that day (because it is a Bank Holiday or Closure Day), iTrent will deduct from your leave 'balance' the number of hours you were contracted to work that day. If a Bank Holiday and Closure Day falls on a day you were not contracted to work, no deduction is made.

**Q - I work part-time and part of my working hours are flexible.**

A – iTrent can only manage absence for people with fixed working patterns. You should discuss how to manage your absence recording with your manager.

**Q - I have two part-time jobs with the University: how do I book my annual leave?**

A - Example: you work Monday, Tuesday, Wednesday in position A and Thursday and Friday in position B.

1. You want to request a single day of leave on a Monday. Enter the leave details and select position A. An email will be sent to the Reporting Managers of position A. If you request a Thursday, iTrent will send an email to the Reporting Manager of position B.
2. You want to request a whole week of leave. Enter the leave details and select '<All Jobs>'. iTrent will send an email to both Reporting Managers and each will need to approve the hours for the relevant position.

**Q - I work mornings only: how do I book one morning as annual leave?**

A - Staff working on a part-time basis should check that the 'work pattern' in iTrent (go to 'View Profile' select 'Employment' tab and click on the job title of your current job) correctly records their days and hours they work each day. When you request a 'full day' of leave, iTrent automatically takes account of the number of hours you work that day. So, if your 'work pattern' in iTrent shows 3:30 hours for a Monday (because you work from 9am to 12:30pm), when you request a 'full day' of leave for a Monday, iTrent will deduct 3.5 hours from your holiday 'balance'. You should, therefore, request a 'full day' of leave if you are requesting the leave on a day when you do not wish to attend work at all.

**Q - I am leaving my job in the Faculty of X to start another job in the Faculty of Y on 1 June 20XX:**



## **what happens to my annual leave?**

A - If you are moving to another job with the same hours (eg full-time to full-time), your untaken holiday balance will transfer to your new appointment.

If your hours are changing (eg you are moving from 0.5fte to full-time), your leave entitlement for the year will be recalculated so that 5/12 leave accrues at 50% of the full-time entitlement and for the remainder of the year leave accrues at the full-time rate.

If you are transferring from a grade D position to a grade E position, your leave entitlement for the remainder of the year will need to be adjusted by your Faculty/Service Annual Leave Administrator to take account of the increased entitlement.

At the earliest opportunity after you are notified of your new appointment, you should speak to both your current Reporting Manager and your new Reporting Manager to discuss your annual leave arrangements.

## **Q - I started working for the University part way through the holiday year: how does iTrent calculate my leave entitlement?**

A - The [Conditions of Employment](#) state that (section 8(g)): *The annual leave entitlement for staff joining or leaving the employment of the University during the course of the year is proportionate to their completed service during the leave year.*

Someone who starts after mid November would be entitled to the full Christmas closure regardless of their accrued holiday. A manual override will be applied by the HR Systems Team before the 31<sup>st</sup> December to avoid a negative balance.

## **Q - I am employed on a fixed term contract until 30 September, but iTrent says I have a full year's leave entitlement.**

A - If your employment at the University is expected to end during the current calendar year (for example if you are employed on a fixed term contract or are planning to retire this year), iTrent calculates annual leave entitlement based on their actual employment end date, which is only entered once it is certain that an employee is leaving.

The [Conditions of Employment](#) state that (section 8(h)): *If an employee whose employment ends during the year has taken more days of leave than s/he has accrued up to their final date of employment, then a deduction will be made from their final salary payment.*

To avoid the University having to reclaim any overpayment from fixed term staff who leave before the end of the leave year (31 December), both the employee and their manager should ensure that they do not request/authorise leave which takes them over their pro-rata entitlement for the part of the year covered by their current contract of employment.

The annual leave calculator on the [Annual Leave pages](#) of the Human Resources website can be used to calculate the entitlement up to the end of the current fixed term contract.

## **Q - What happens to my leave if I haven't used all of it by 31 December?**

A - You should note that there is no entitlement to carry forward leave, but your Dean/Head of Faculty/Service or other senior manager may give you permission to carry forward up to 36.5 hrs (equivalent of 5 days') leave where it is not possible (eg for operational reasons) for you to take all your leave entitlement before 31 December.

Although iTrent will automatically carry forward up to 36.5 hrs unused annual leave to the next



calendar year, it is essential that you obtain your manager's agreement to this. Any balance carried forward must be used in the first 4 months of the new calendar year. For further information see section 8(i) of the [Conditions of Employment](#).

**Q - I joined the University before 1999 and have some 'banked leave': is this recorded in iTrent?**

A - Banked leave, which only applies to a limited number of support staff who joined the University before 1999, is not recorded within iTrent – your Faculty/Service should maintain a separate record of this.

**Q - I work term-time: why can't I see my annual leave in iTrent Self Service?**

A - The [Conditions of Employment](#) state that (section 8(l)) staff working on a term-time basis may not take leave during term-time and that their pro-rata paid leave entitlement is taken on unspecified days during the vacation periods. Consequently, 'term-time staff' do not have discretion over when they can take their annual leave.

**Q - I was sick while on leave, what should I do?**

A - If, following your return to work, you can present a medical certificate covering your absence, the period of annual leave you were unwell can be reinstated. If any of the leave you previously requested has already passed, then it will not be possible for you to cancel the request via iTrent Self Service and it will be necessary for the 'Annual Leave Administrator' for your Faculty/Service to make the adjustment in iTrent. For further information see section 10(f) of the [Conditions of Employment](#).

**Q - What happens if I try to book more annual leave than I have left in my balance**

A - iTrent will allow you to request more leave than you have left in your balance. This will show on both the confirmation email you receive, and the email sent to your Reporting Manager that your balance is negative (marked in red). Clearly employees should ensure that they do not request more leave than they are entitled to take.

Any negative balances will be carried forwarded and deducted from the new calendar year.

**Q - I have requested my final 'full day' of annual leave for the current leave year but iTrent shows I have an untaken leave 'balance' of 0.3 hours – what does this mean?**

A - iTrent will calculate leave entitlement and the figure will not always equate to a full or half day and a small remainder will be shown. This remainder will automatically be carried forward to the following calendar year.

**Q - My job with the University requires me to work on a Bank Holiday: how does iTrent deal with this?**

A - iTrent assumes that if a Bank Holiday or Closure Day falls on a day you normally work, you are on holiday on that day and a deduction is made to your leave 'balance'. If in fact you are required to work, then it will be necessary for the Annual Leave Administrator for your Faculty/Service to mark this as 'Not taken' in iTrent so that your leave 'balance' is corrected, and you are able to request alternative time off on another day.

**Q - I don't have a regular working pattern. Can I use iTrent to record annual leave?**

A - iTrent uses your working pattern to calculate how much leave should be deducted for each full or half day of leave taken as annual leave, bank holiday or University closure day. If you do not have a

regular working pattern, iTrent is not suitable for you.

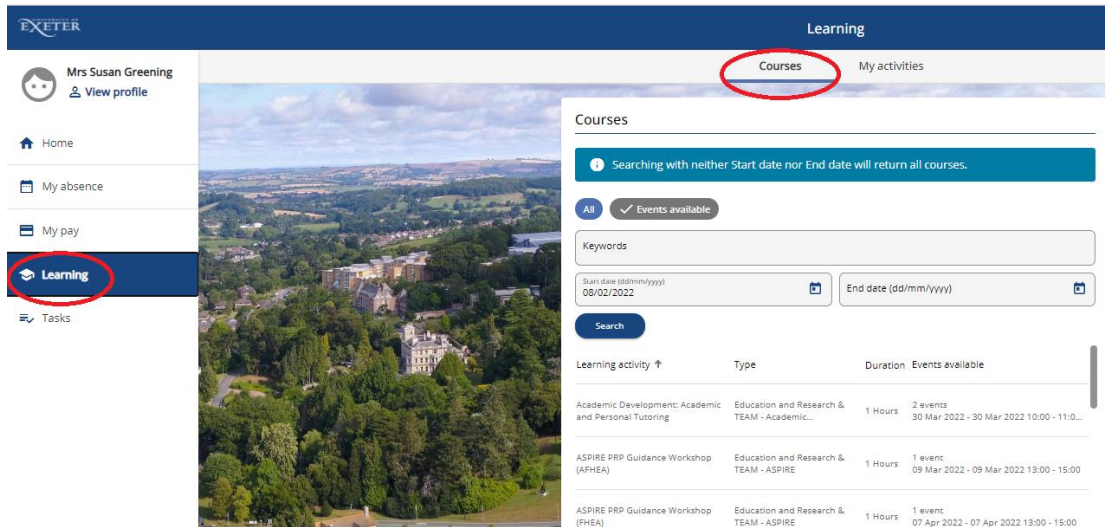
Please note that iTrent can record multi-week working patterns. So, if you work regular hours on a recurring rota basis, you can use iTrent to record annual leave.

If you cannot find the solution to any problems, you are having in this User Guide then please log a call via [hssystemsteam@exeter.ac.uk](mailto:hssystemsteam@exeter.ac.uk).

# Booking Learning Events


## How to book a course


Click on the section  Learning which automatically opens to the 'Courses' tab



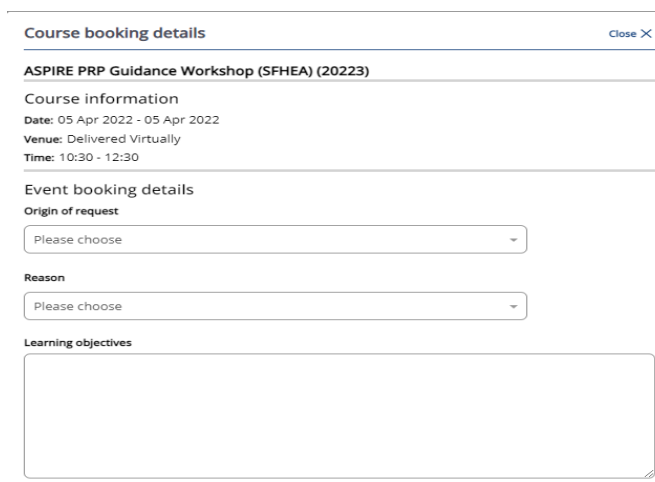
Search for a course by entering a keyword eg 'Health' or 'ILM'. (Alternatively, you can visit the [course calendar](#) on the website to identify the course title you wish to search for).

Once you've identified the course click on it. This will show the full details for the course, the dates available, including how many spaces are available.

If there are no spaces available for your chosen course you can use the  button to add yourself to the waiting list. Please note that those on the waiting list will be contacted when new dates are arranged.

If there is a space available, click on  – this will take you to the 'Course booking details' screen (see below).

Enter the relevant details and click 




The 'Course booking details' form for the ASPIRE PRP Guidance Workshop (SFHEA) (20223) includes the following sections:

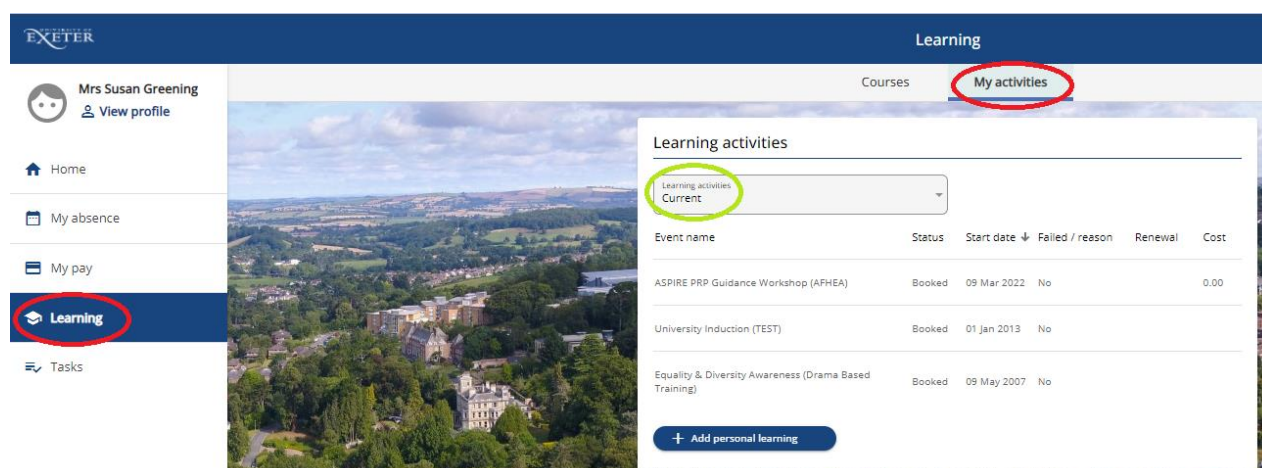
- Course information**
  - Date: 05 Apr 2022 - 05 Apr 2022
  - Venue: Delivered Virtually
  - Time: 10:30 - 12:30
- Event booking details**
  - Origin of request: Please choose (dropdown menu)
  - Reason: Please choose (dropdown menu)
- Learning objectives**
  - A large text area for entering learning objectives.

Your booked course will appear as a new learning activity on the 'My activities' tab.

When you book or cancel a learning activity you will receive confirmation via email. You will also receive a calendar appointment. You should open the calendar appointment and save and close it to add the course to your calendar.

## Viewing booked and completed courses


Click on the section  Learning and select the 'My Activities' tab

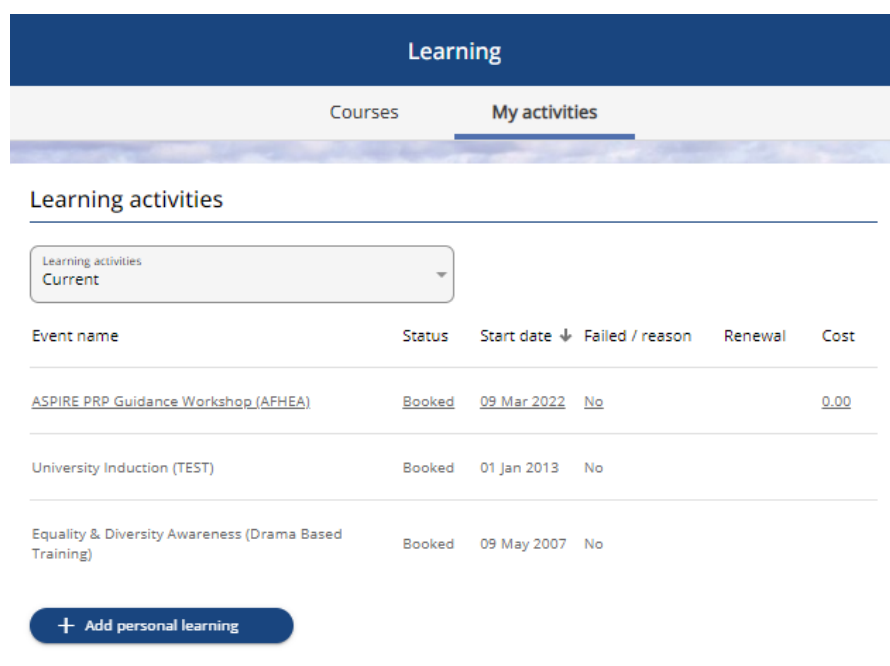


This screen allows you to view all your learning activities whether current, booked, completed, cancelled or on a waiting list. To change the view, you can do this by using the filter to modify your view (circled in green above).


This screen also allows you to record personal learning activities.

## How to cancel a course

Click on the section  Learning and select the 'My Activities' tab.



Click on the course you wish to cancel.

On the 'Course booking details' screen (see below) enter the reason for cancellation and select the  Save button.

You can, at the same time as cancelling, join the waiting list for the course. You will then be automatically notified of further dates as they become available.

[← Back to My activities](#)

Course booking details

**ASPIRE PRP Guidance Workshop (AFHEA) (20221)**

Course information

**Date:** 09 Mar 2022 - 09 Mar 2022

**Venue:** Delivered Virtually

**Time:** 13:00 - 15:00

Event booking details

\* **Cancel reason (required)**

Please choose ▼

Join waiting list

Other participants

Other information

<b>Origin of request</b>	Employee request
<b>Reason</b>	Personal development
<b>Mobility constraints</b>	No



## FAQs – iTrent Self Service

- [Who should I contact if my employment details are incorrect?](#)
- [What should I do if my date of birth is incorrect?](#)
- [Will any changes that I make to my personal information be passed on to relevant third parties \(i.e. HMRC etc.\)?](#)
- [What should I do if there is an error on my payslip?](#)
- [My name has changed, can I change my University e-mail address to reflect this?](#)
- [Who has access to my details?](#)
- [How secure is the information held on the System?](#)

### **Q - Who should I contact if my employment details are incorrect?**

A – Details relating to your current job, or your current working location cannot be amended through Self Service. You should therefore ask your Reporting Manager to contact the HR Admin Team.

### **Q - What should I do if my date of birth is incorrect?**

A – We are unable to offer you the option of being able to change your date of birth through Self Service; therefore if the date of birth shown in the system is incorrect you should contact the [HR Admin team](#) to request that they correct it; you will be asked to provide documentary evidence to confirm this

### **Q - Will any changes that I make to my personal information be passed on to relevant third parties (i.e. the Inland Revenue etc.)?**

A – The University does not pass on details of any changes that you make to your address or other personal information to any third parties (i.e. HMRC etc). It is therefore your responsibility to inform any relevant third parties of any relevant changes to your address or other personal information.

### **Q - What should I do if there is an error on my payslip?**

A – If you are worried that there is an error on one of your payslips you should firstly double check your own records to make sure that this is a genuine error, then if you still believe there is you should contact the [Pay and Benefits Team](#) to discuss.

### **Q - My name has changed; can I change my University e-mail address to reflect this?**

A – Once you have notified Human Resources of your new name this information will automatically feed through from iTrent and update your email address. NB This does not happen immediately.

If you would like to keep your University e-mail address despite your name change you will need to log an enquiry with [IT Services](#) after it has been updated on iTrent.

### **Q – Who has access to my details?**

A - Staff in Human Resources and Finance Services have access to the information required to carry out their specific roles.

Additionally, some Reporting Managers have People Manager access to iTrent which allows

them to view person and position-related information for the staff who report to them, and Senior Managers and Administrators in your Faculty/Service may be able to view limited information about all staff in their Faculty/Service.

No staff outside Finance Services or Human Resources will have access to your bank details. Senior staff outside these areas will only have access to the information related to your salary, not payslip details, i.e. tax details or deductions.

Access to information about other employees is only permitted if:

- There is a genuine business need for an individual to access this information
- The iTrent user understands and agrees to comply with Data Protection legislation and the University's IT regulations

Other staff cannot see your details through Self Service – and you can't see theirs. For further information, the University's HR Services Data Protection Statement can be viewed [here](#).

#### **Q – How secure is the information held on the System?**

A – The data within iTrent is held within an Oracle Database. Access to data within the system requires an iTrent user ID. 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 a responsibility.

Connections to iTrent are encrypted, look for the  symbol in your browser.

To ensure the security of the information held in the system, you should also always remember to log out or lock your PC when you have finished using Self Service

If you cannot find the solution to any problems, you are having in this User Guide then please raise a query by emailing [hssystemsteam@exeter.ac.uk](mailto:hssystemsteam@exeter.ac.uk).