

Guidance for using iTrent for PTA payments

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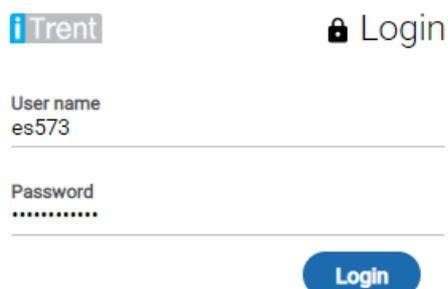
PTA Coordinator guide to authorising hours using the electronic timesheet

Postgraduate teaching assistants are paid by recording and claiming for the hours they work via iTrent, the University’s payroll and Employee Self Service (ESS) system. This guide shows how to access and approve a claim submitted by a PTA via the ESS system

Authorising a timesheet

You will receive an email informing you that a PTA has submitted a timesheet which needs authorisation: “New Timesheet Submitted”.

If the claim details within the email are correct, click on the  button at the bottom of the email, you will be prompted to sign in to iTrent People Manager using your usual University username and password as authorisation:



The screenshot shows the iTrent login interface. At the top left is the iTrent logo, and to its right is a 'Login' link with a lock icon. Below this are two input fields: 'User name' with the text 'es573' and 'Password' with a masked password '.....'. At the bottom center is a blue 'Login' button.

By logging in you will automatically authorise the claim and the system will take you to your “To Do” list. You can now log out of the system.

Clicking the  button will display the claim for viewing. Authorisation can be granted by selecting ‘Authorise’ from the drop down list:

Time & Expenses claim PTA hours worked

Employee: Ms Emma Leafield
 Job title: Postgraduate Teaching Assistant
 Work location: Exeter - Streatham
 Reference: PTA02122
 Payroll: Monthly

Authorisation
 User name: CDDOLBY
 Authorisation status*
 Reason

Page 1
 Add hours for PTA work and related training only.
 Use the '+' button to add more rows.
 Click 'Submit' to send claim form to your manager for authorisation or 'Save draft' to keep the details entered for editing/submitting later.

Element	Date	Comment	No of hours*
Hours worked	23/01/2020		1.50
Training hours			

SAVE NEW

The system will email the PTA confirming that their timesheet has been approved.

Note: If the link in the email does not work this will be because the PTA has cancelled the timesheet the task will automatically be removed from your task list.

Rejecting a timesheet

If the claim details within the email are not correct, click on the View Details button  at the bottom of the email and sign in to iTrent People Manager using your usual University username and password.

This will take you directly to the relevant timesheet. Use the dropdown by "Authorisation status" and select "Reject".

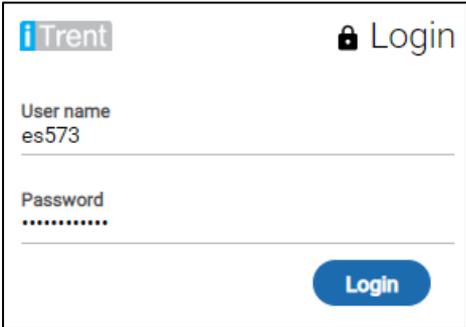
Please also add your reasons into the "Reason" field. This wording will then appear on the email received by the PTA informing them that their timesheet has been rejected. They are able to amend their claim and resubmit it to you.

Click the "Save" button , the screen will then change and take you to your "To Do" list. You can now log out of the system.

Authorising (or rejecting) multiple timesheets

Log in to iTrent https://trent.exeter.ac.uk/hrpr_web/wrd/run/etadm001gf.open

Use your staff username and password



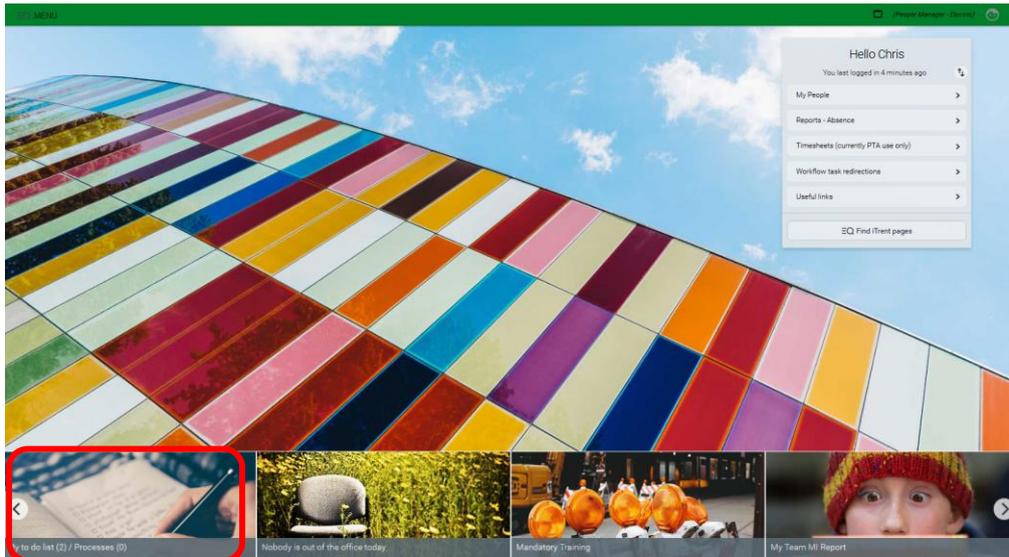
iTrent Login

User name
es573

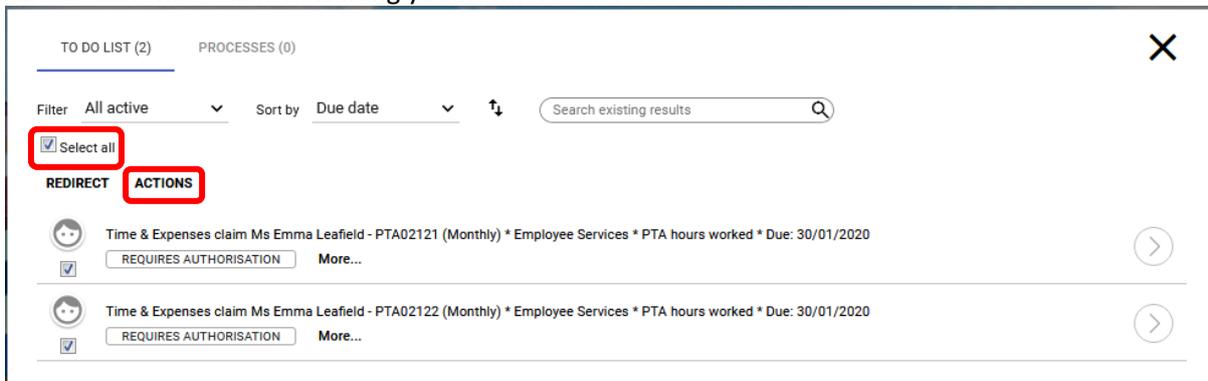
Password
.....

Login

Open "To do list" which can be found in the Company news area:



All the timesheet claims awaiting your authorisation will be listed:

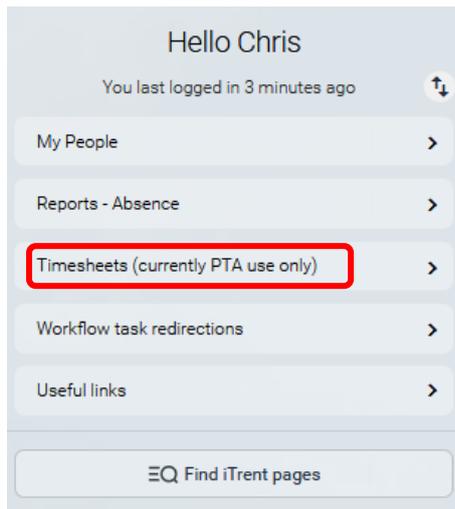


You can access each claim by clicking on it, this will open the claim details and you can authorise in the same way as described above.

Alternatively, you can tick the boxes on the left hand side of the claims you wish to authorise or click "Select all". A new option "Actions" will appear, choose "Authorise" or "Reject" from the dropdown.

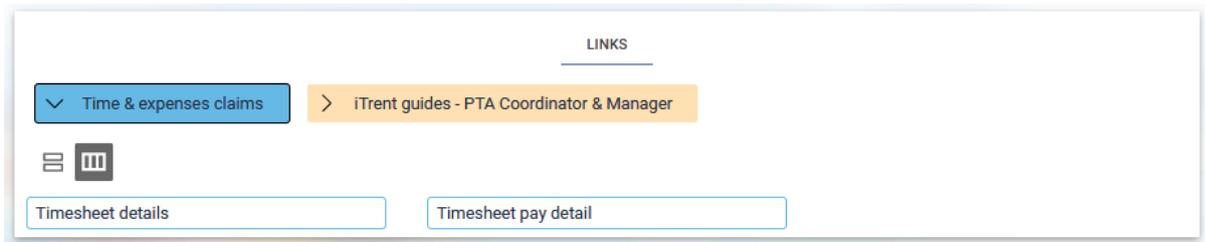
Viewing a PTA's timesheet history

Additional information such as timesheet details, pay details and guides can found using the link 'Timesheets (currently PTA use only)' from the iTrent homepage.



You will be prompted to select an individual from a list of your reportees. Once selected you will then be prompted to select a particular claim.

The following options are then available:



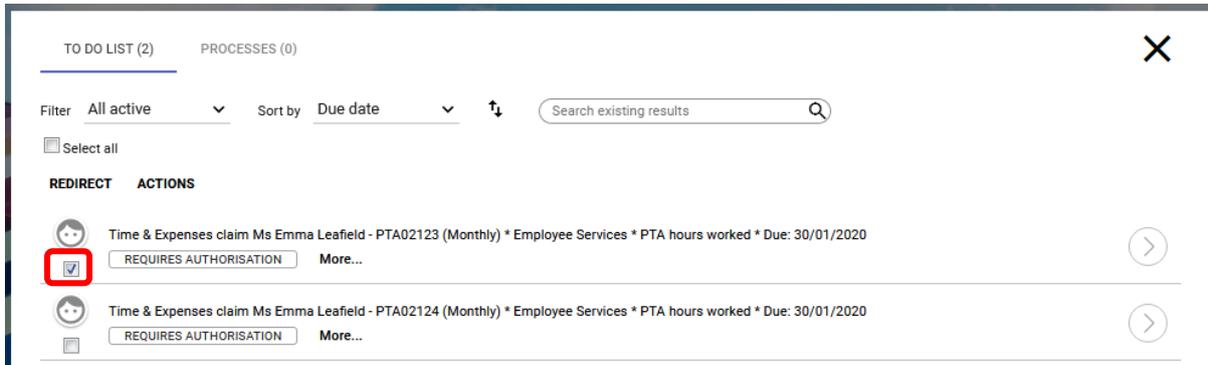
By either first clicking on a link then searching for and selecting the PTA, or vice versa, you can:

- *Timesheet details*: View the full timesheet details including comments
- *Timesheet pay detail*: View the cash values of a claim

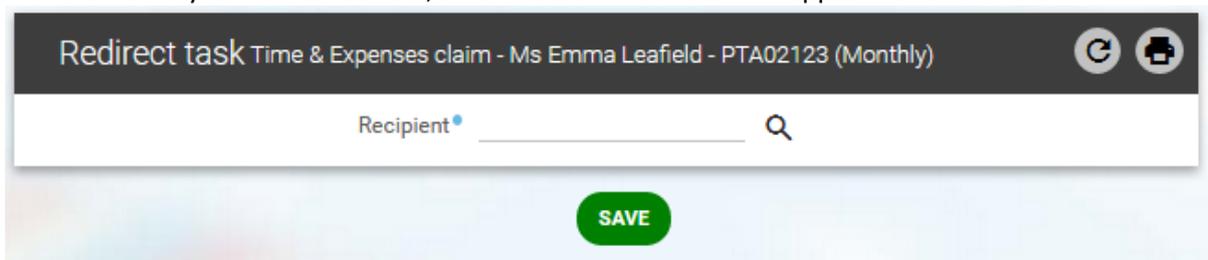
Redirecting a timesheet to another PTA Coordinator for authorisation (eg work undertaken in a different discipline)

If your PTA undertakes work for other disciplines, you can forward their timesheet for authorisation to another PTA Coordinator.

Open the “To do list” from the Company news. All the timesheet claims awaiting your authorisation will be listed:



Tick the claims you wish to redirect, a new button “Redirect” will appear. Click that button:



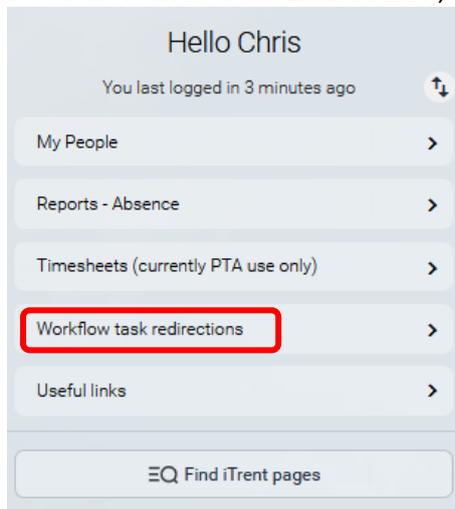
Click on the magnifying glass. Key in the PTA Coordinator’s surname and click on the magnifying glass. Hover your mouse over the usernames listed, or scroll to the right, to display the full name, click on the new PTA Coordinator and click the “Save” button.

The task will appear in the new PTA Coordinator’s task list but they will not receive an email, unless they do not authorise it for five days in which case a reminder email will be sent.

Redirecting all timesheets to another PTA Coordinator for authorisation (eg out of office, holiday/sickness cover)

If you are going to be absent from work for a period of time, you can set up a redirect to forward all timesheets for authorisation to another PTA Coordinator.

From the home screen Links section, click on “Workflow task redirections”



Click on [My task redirection details](#)

Complete the redirection details with the dates you will be away:

A screenshot of a web form titled 'My task redirection details'. The form has a dark header with the title and a 'MENU' button. Below the header are five input fields: 'Start date' with a calendar icon, 'End date' with a calendar icon, 'Process type' with a dropdown menu showing 'Task processes', 'Process' with a magnifying glass icon, and 'Redirect to' with a magnifying glass icon.

Start Date: Enter your absence start date

End Date: Enter your absence end date

Process Type: Leave blank to select individual processes or select “Redirect all” to redirect all workflow tasks e.g. including holiday requests etc.

Process: Use the magnifying glass to search for “PTA” and choose the first option, you will need to set up a Redirect for each of the “PTA options listed.

Redirect to: Search for the new PTA Coordinator.

Click save and repeat for the remaining “PTA” options listed.

Authorising holiday pay

A PTA will have all accrued holiday pay paid automatically at the end of their contract. However they can request payment of any accrued entitlement at any time. This is processed via iTrent in the same way any colleague requests holiday.

Once the PTA has submitted a request you will receive an email with the details:



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Annual Leave Request

One of your reportees has made a request that needs your authorisation.

[REDACTED] Postgraduate Teaching Assistant (EMPS)	Type: Annual leave Start date: 16/08/2019 End date: 16/08/2019	Authorise View Details
	Start balance: 2.517 hours Holiday requested: 5 hours End balance: -2.483 hours Entitlement will be exceeded	

To authorise holiday requests via the Tasks tab within iTrent Self Service please click [here](#).

Notes:
Test for over hours request

Details of iTrent Self-Service can be found in the [User Guide](#).

Clicking either the “Authorise” or “View Details” buttons will take to the iTrent login page. If you clicked “Authorise” then, after successful login, iTrent will automatically go to the required page and authorise the request. Otherwise the Holiday details page of the submitted request will be displayed.

If the PTA has requested more hours than accrued then the red warning message “Entitlement will be exceeded” is displayed and the request cannot be authorised.

All holiday requests will also be available to be viewed/processed via the “To do list”.

Confirmation of any action will be emailed to the PTA and the status of their request updated in iTrent Self Service.

All holiday authorised within a calendar month will be paid to the PTA in the following month’s pay run.

Holiday requests can be redirected in the same way as Timesheet claims.