



University
of Exeter



Quick Reference Guide to People Manager

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External Links

[iTrent People Manager Log In](#)

[University iTrent web page](#)

[Human Resources web page](#)

[HR Advisors contacts web page](#)

[PS Connect Portal](#)

[Conditions of use for data from iTrent](#)

[Guidance on the Sickness Absence Procedure](#)

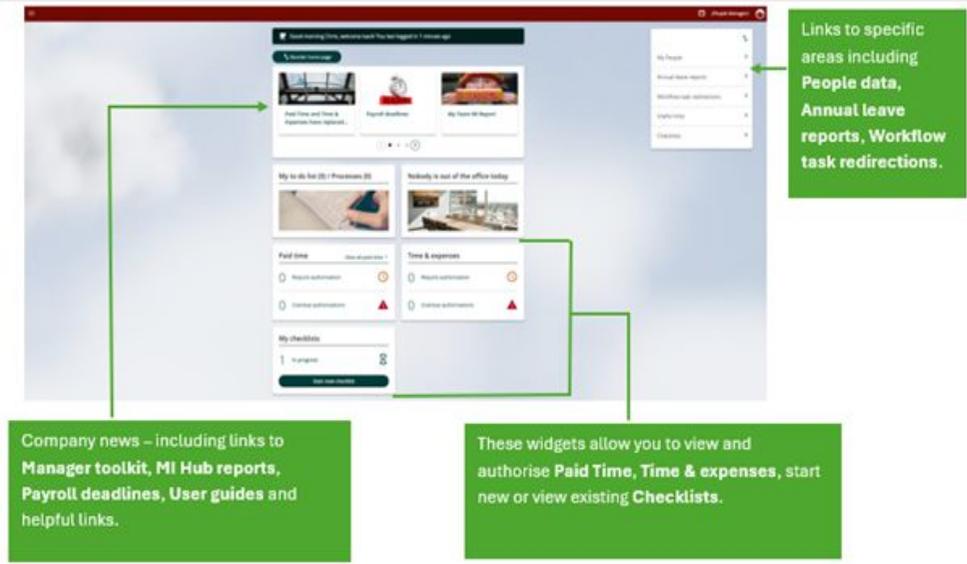
Introduction & Access

This tool enables Managers to view personal and organisational details, record sickness absence and approve annual leave for staff that report to them.

As a People Manager user, you will only have access to the information relating to your direct reports and the staff who report to them. This includes some sensitive data, and it is essential that you use it responsibly to ensure the security and confidentiality of your team's information. Further details can be found here - [Conditions of use for data from iTrent HR System](#)

Navigation Overview

[Log in to iTrent](#) (if you have more than one role select "People Manager" from the drop down). The following screen will open:



Links to specific areas including **People data, Annual leave reports, Workflow task redirections.**

Company news – including links to **Manager toolkit, MI Hub reports, Payroll deadlines, User guides** and helpful links.

These widgets allow you to view and authorise **Paid Time, Time & expenses**, start new or view existing **Checklists**.

My People

- Click on this link to view details of reportees. Go to [Viewing your reportees](#) for further guidance.

Annual leave reports

- Click on this link to run either a Holiday Entitlement Breakdown or an Outstanding Holiday Entitlement report.

Workflow task redirections

- Click on this link to set up task redirection to another manager if you are due to be absent from work and unable to authorise annual leave requests or PTA timesheets.

This will forward all workflow related Tasks and Emails to another specified user for the duration set.

You will need to enter the start and end date (if known - leave blank for ongoing redirections and end date can be added later), change the 'Process type' to *Redirect all* and search for the individual who is to receive the notifications in your absence by clicking on the magnifying glass against 'Redirects to'.

Useful links

- This provides you with additional links such as user guides, HR policies and employment information.

Additional widgets

Widgets for Paid time, Time & expenses, and Checklists are available on the Homepage:

- Paid time – This allows you to view and approve Paid time. Go to Paid time for further guidance
- Time & expenses – This allow you to view and approve any overtime/call-out. Go to Time & expenses for further guidance.
- Checklists – These guide you through various tasks eg confirming probation, uploading sickness certificates. Go to Running Checklists for further guidance.

Viewing your reportees

If you click on the My People link you will be taken to a new view that lists all of your reportees. Once you have selected an individual you will see the following employee summary screen:

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

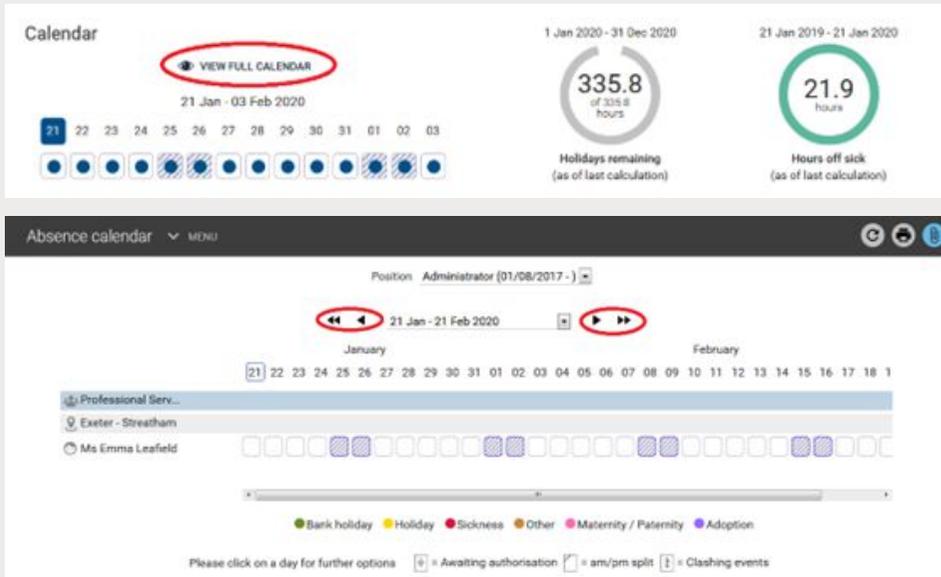
Which link you've clicked on will determine what screens are then available. In the example above the fields in the white boxes are those available within the area.

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 [hamburger menu icon] which will expand the section.

When clicking on any date sensitive screens you will be prompted to enter an effective date.

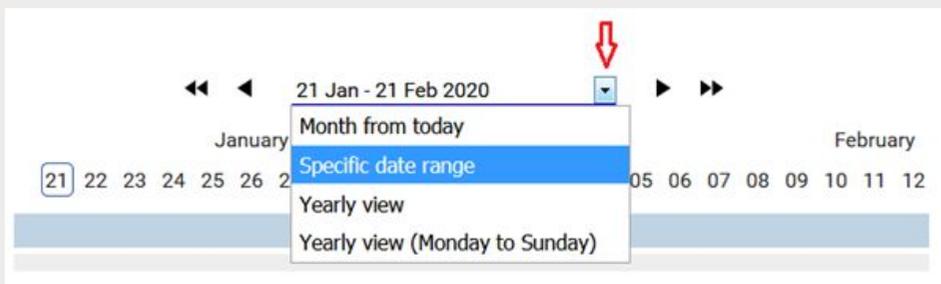
Calendar Section

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 all of your reportees you can use the 'Select all' or select multiple people in your list of reportees by using 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

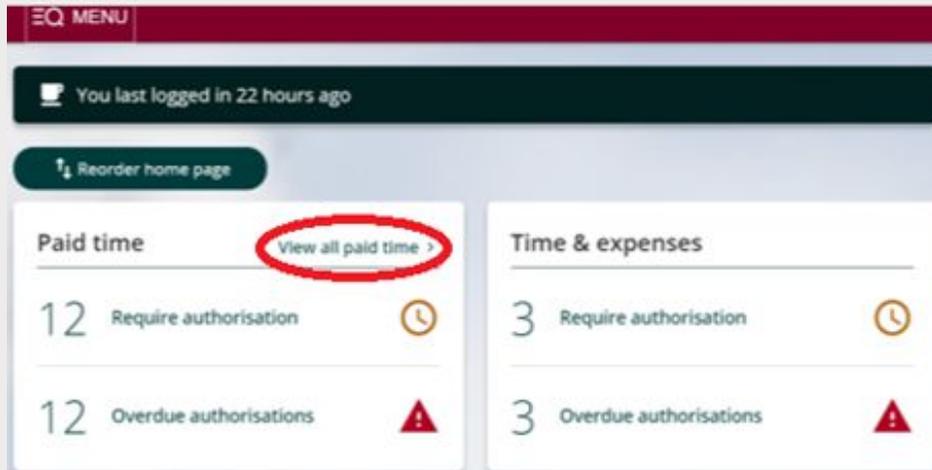
If you have more than one iTrent role you can click on  in the top right-hand corner of the screen and this will list the other roles available to you or give you the option to log out.

Paid Time

When one of your people submits a Paid time, you will receive an email advising you that you have approvals to make.

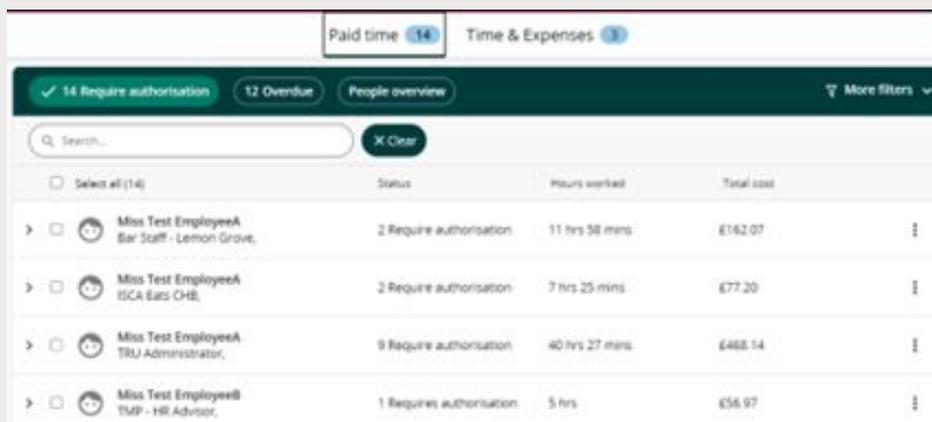
By clicking on the link at the bottom of the email you will be taken to the Paid time to be approved.

On the home screen you will also see the Paid Time for your people.

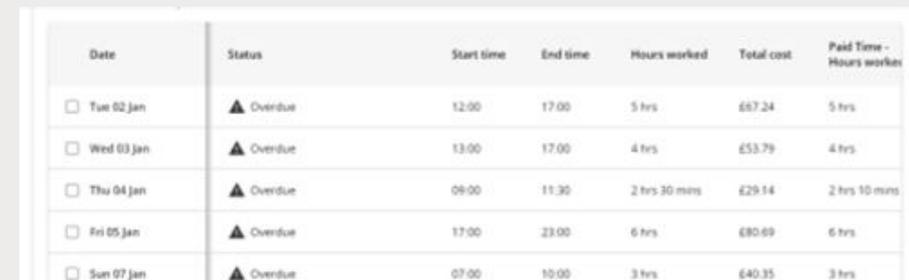
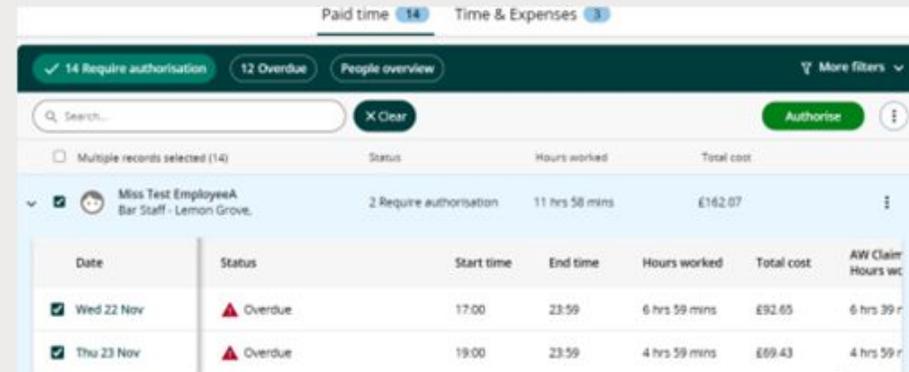


By clicking on "View all paid time" you will be taken to your peoples Paid time that need your authorisation.

Click on the arrow > to see the paid time that requires authorisation

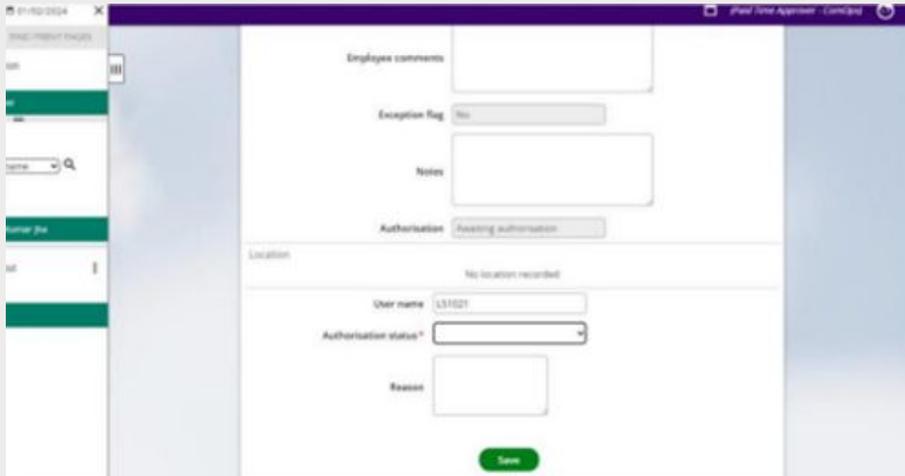


All will be ticked automatically, alternatively if you only want to authorise them individually you can by unticking the box and selecting the one that you want to authorise. To authorise the paid time selected, click the green "Authorise" button in the top right-hand corner.



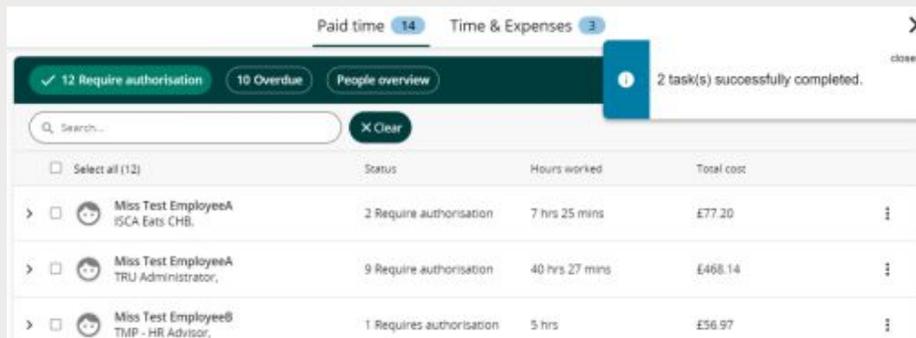
You can also authorise or not authorise the paid time by clicking on the applicable paid time status.

Scroll to the bottom of the page, you will see a dropdown for you to choose to “Authorise” or “Not authorise” the paid time.



Click on the green “save” button.
The time sheets will be removed from your queue and a pop-up box will advise the number of tasks that have been successfully completed.

Once a Paid Time record has been approved you will receive a confirmation email.
Further information on how to identify the correct cost code for claims can be found under [Finding the cost code for a claimant's position](#).



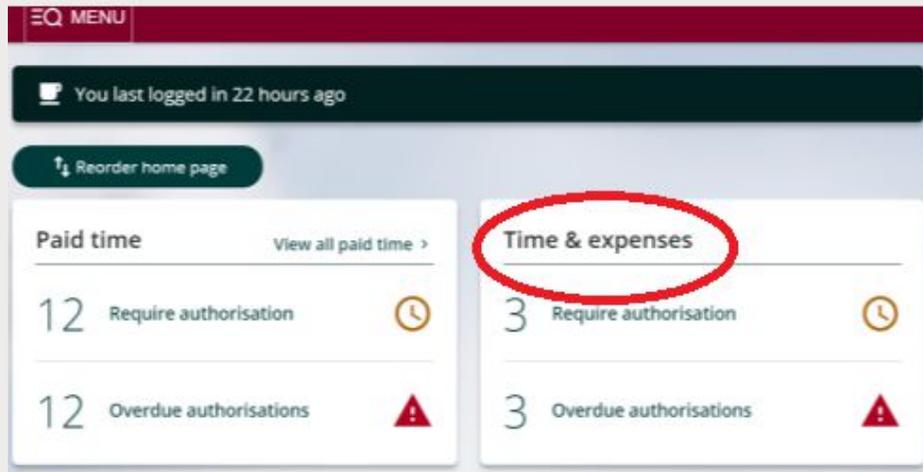
Select	Status	Hours worked	Total cost
<input type="checkbox"/>	2 Require authorisation	7 hrs 25 mins	£77.20
<input type="checkbox"/>	9 Require authorisation	40 hrs 27 mins	£468.14
<input type="checkbox"/>	1 Requires authorisation	5 hrs	£56.97

Time & Expenses (including PTAs)

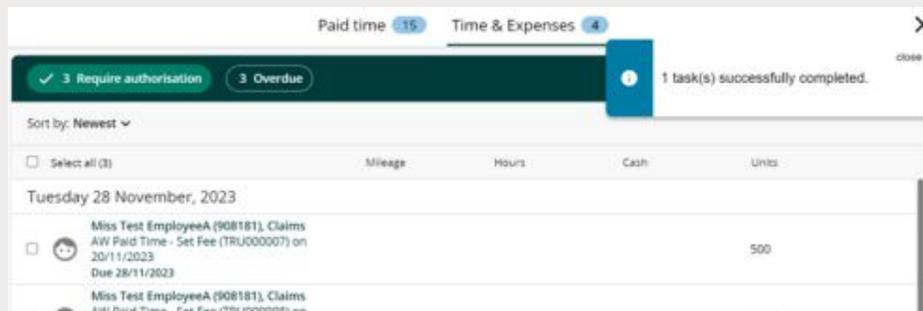
When one of your people submits a Time & Expense, you will receive an email advising you that you have approvals to make.

By clicking on the link at the bottom of the email you will be taken to the Time & Expense to be approved.

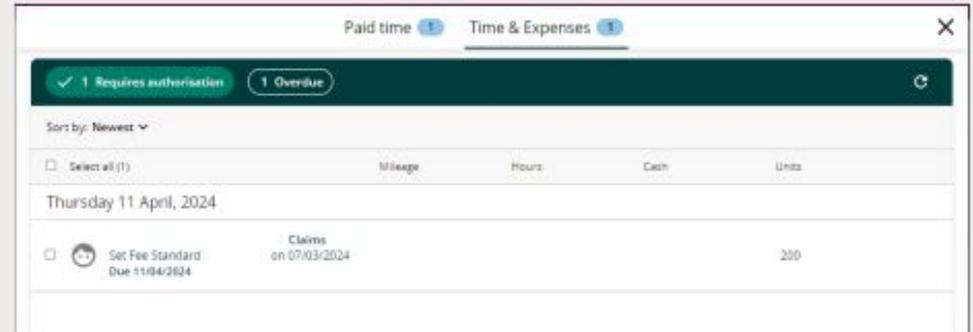
On the home screen you will also see the Time & expenses for your people.



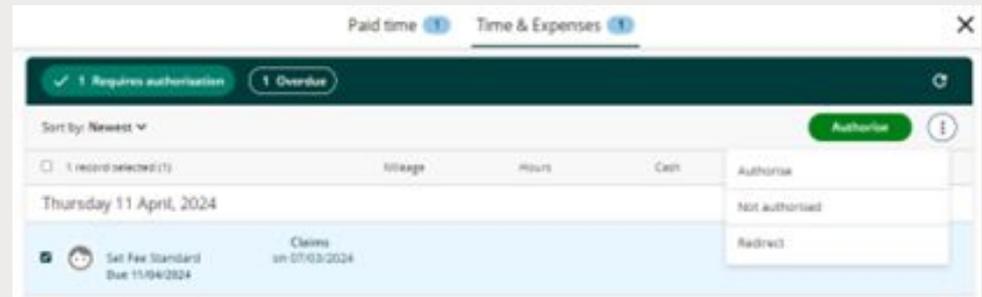
By clicking on Time & Expenses widget, you will be taken to your peoples Time & Expenses that need your authorisation.



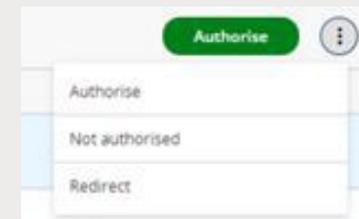
Click on 'Require authorisation' to see the Time & Expenses that requires authorisation.



To authorise the Time & Expenses selected, click the green "Authorise" button in the top right-hand corner.



You can also authorise, not authorise, or redirect the Time & Expense by clicking on the three vertical dots next to the green authorise button.



Once an option has been chosen, the time sheets will be removed from your queue and a pop-up box will advise the number of tasks that have been successfully completed.

When authorising Time & Expenses, the approver has the option to 'Override Position Cost Code' before approving the claim. This allows an amendment to the original cost code attached to the claimant's position.

Element	Date	Comment	Override Position Cost Code	Fee claimed £*
Cash	01/03/2024	TEST		150.00

The Claimant also has the option to 'Override Position Cost Code' when submitting Time & Expenses.

If the claimant chooses to override the position cost code, this will appear in the "Override Position Cost Code" box when an approver authorises Time & Expenses.

Element	Date	Comment	Override Position Cost Code	Fee claimed £*
Cash	01/03/2024	TEST	TEST	150.00

Once a Time & Expense record has been approved you will receive a confirmation email.

Further information on how to identify the correct cost code for claims see under Finding the cost code for a claimant's position.

If a Time & Expense record has been redirected to you, it will show in the Widget, however you may not be able to see the details of the claim. In these instances, you can turn off the widget so that the Time & Expenses claim will show in the "My to do list" and you can see the full details of the claim.

Click on the  icon in the top right-hand corner of the home screen and got to "My Preferences"

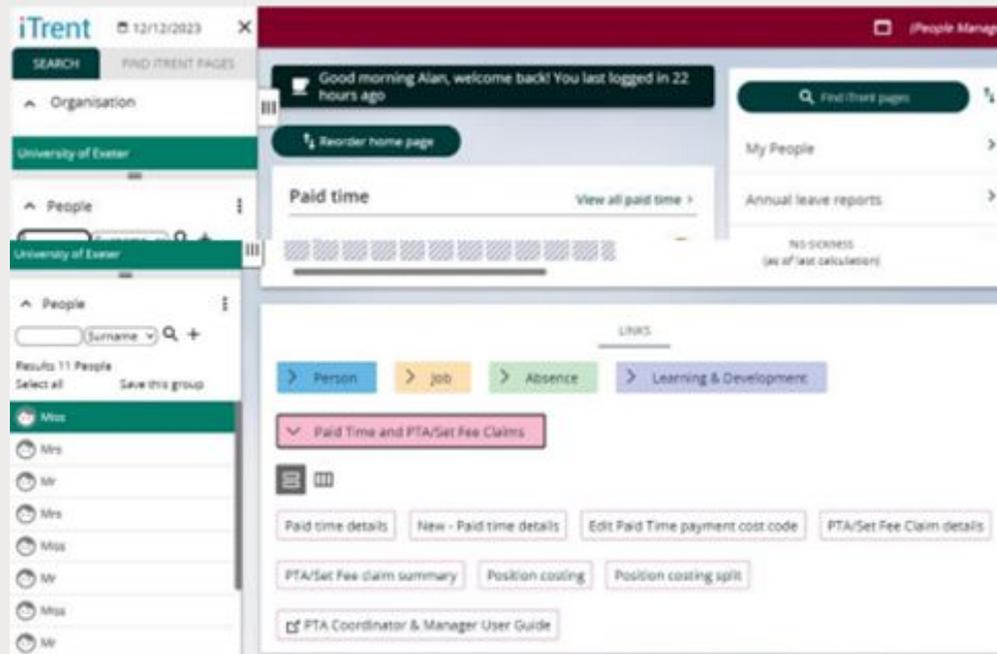
Under "Workflow" Untick the "Use authorisation page" and "Save"

Default user preferences

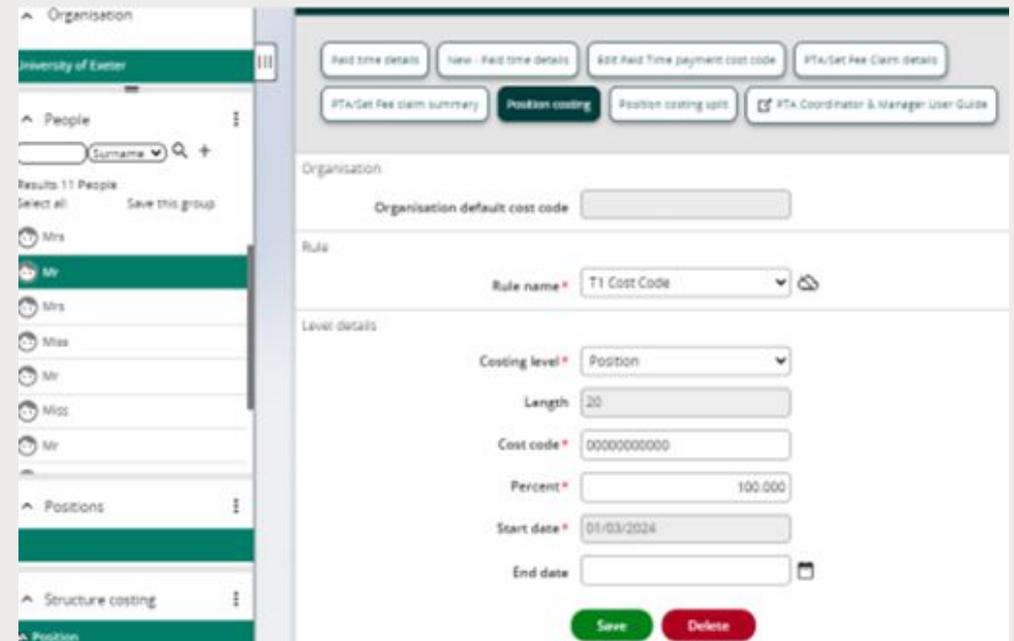
- Defaults
- Workflow
 - Search for new tasks every (seconds) 60
 - Notify of new tasks at logon
 - Number of days showing completed tasks 2
 - Enforce navigation security
 - Enforce security
 - Allow workflow authorisation without password
 - Allow workflow task redirection
 - Use authorisation page
- Application start up
- People manager
- Electric theme
- Task authorisation and summary

Finding the cost code for a claimant's position

From the Homepage click on 'My People' to view details of your people, shown on the left-hand side of the screen. Using the search button by their surname, payroll number, etc.



You will need to select "Paid Time and PTA/Set Fee Claims" and then click "Position costing" to view the cost code attached to the claimant's position.

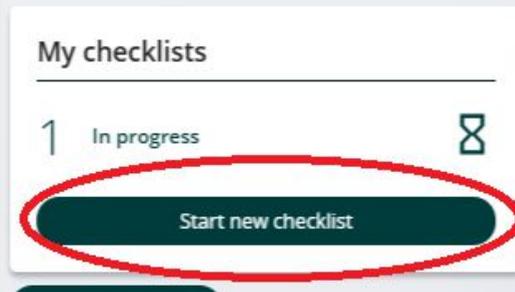


To view the cost code for a claimant, you will need to select their name from the search list on the left-hand side.

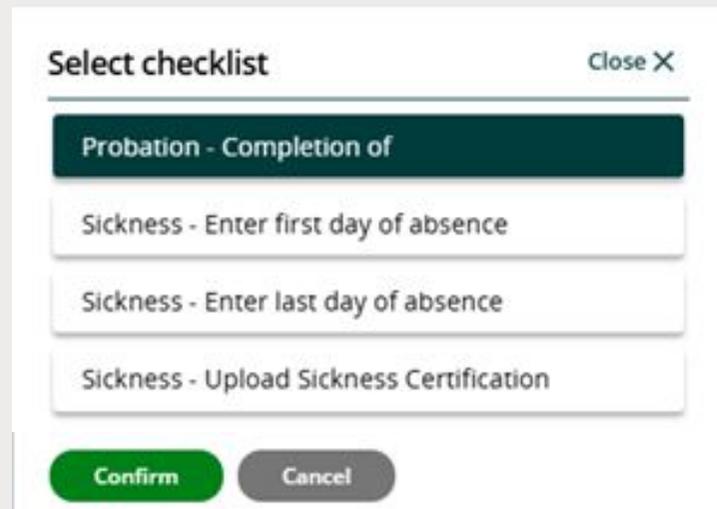
Running Checklists

Checklists have been designed to guide you through the steps required for various tasks in iTrent, such as completing someone's probation, recording sickness absences, uploading sickness certificates.

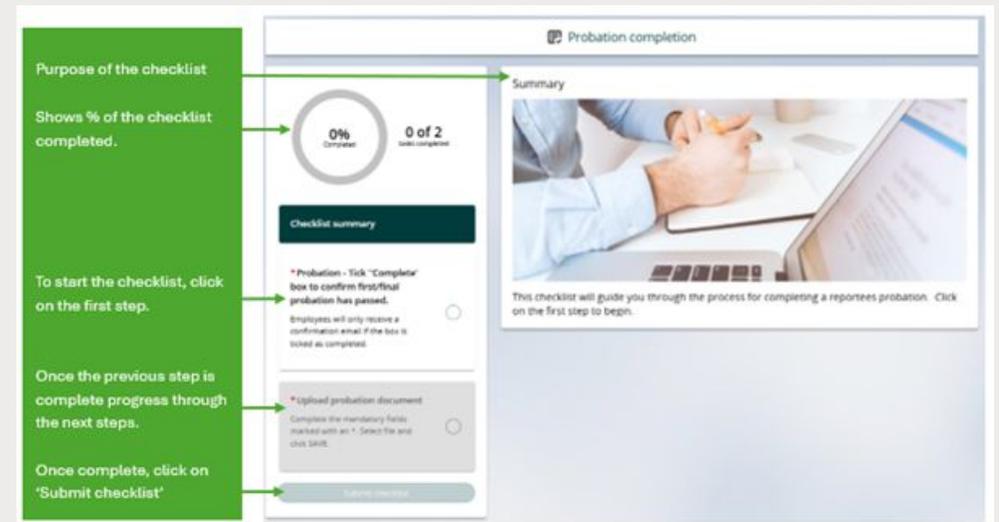
Click on 'Start new checklist' from the 'Checklists' widget from the home page.



Select the relevant checklist from the list available and click



This will take you into the start of the checklist.

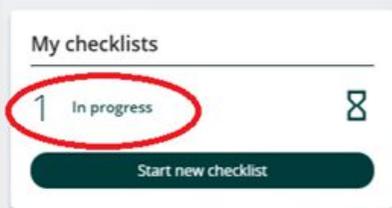


The * indicates any mandatory fields that need to be completed prior to submitting the checklist.

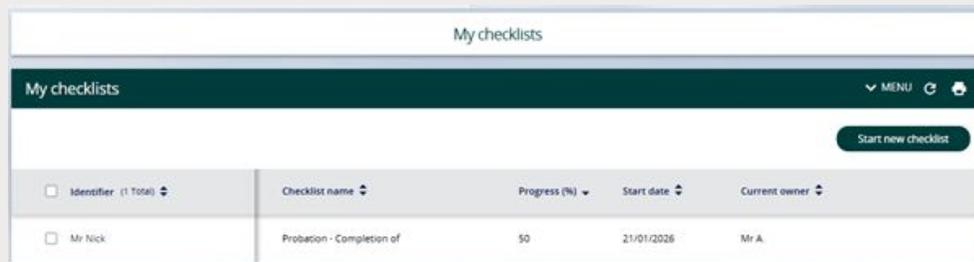
As soon as you click on the first step, you will be prompted to select the appropriate record on the left-hand side eg employee.

Incomplete Checklists

If for any reason you have not finished a Checklist or failed to 'Submit' it, you will find the details of these in the widget on the home page. Click on 'In progress' for further details:



This will show you details of the checklist



A screenshot of a table titled "My checklists". The table has a dark green header with the title and a "MENU" button. Below the header is a dark green button with the text "Start new checklist". The table has five columns: "Identifier (1 Total)", "Checklist name", "Progress (%)", "Start date", and "Current owner". There is one row of data.

Identifier (1 Total)	Checklist name	Progress (%)	Start date	Current owner
<input type="checkbox"/> Mr Nick	Probation - Completion of	50	21/01/2026	Mr A.

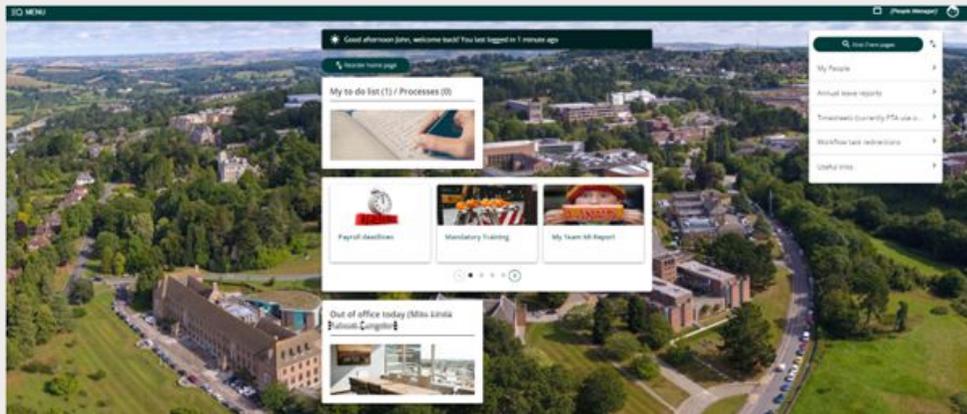
If you click on the name within the 'Identifier' column it will take you to the step that needs completing or give the 'submit' stage. Once submitted they will disappear from the list above.

Sickness Recording

Logging a new sickness absence

[Log in to iTrent](#) (if you have more than one role select People Manager).

Select 'My People' or 'People' from the home page.



Action:

- Select the appropriate individual.
- Select **> Absence** from the 'Links' section at the bottom of the screen.
- Select **New - Sickness absence**
- "Sickness period" - This defaults to 'More than one day'. Do not amend (unless it's for a phased return) - even if the employee is only absent for one day or part of a day as this can be recorded in the following fields.
- Enter the 'Absence start date'

- Enter 'Absence start type' - selecting either 'Full day' or 'Half Day' as appropriate.

- Do not enter an end date. The record will remain open until the employee returns to work and enters their return date.

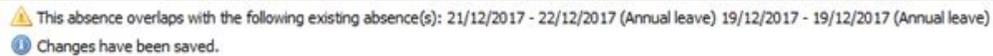
- Enter 'Absence type' and select 'Absence reason'

- Click **Save**

A screenshot of the 'Sickness absence details' form. The form is divided into several sections: 'Sickness period', 'Absence start', 'Absence end', and 'Absence'. Each section contains input fields and dropdown menus. Red arrows point from text annotations on the right to specific fields in the form. The annotations are: 'Do not amend.' for 'Sickness period' (set to 'More than one day'); 'Enter start date.' for 'Absence start date'; 'Select 'Full day' or 'Half day' as appropriate.' for 'Absence start type' (set to 'Full day'); 'Do not amend.' for 'Absence end date' and 'Absence end type' (set to 'Full day'); 'Pick 'Sickness'.' for 'Absence type'; and 'Pick reason from the dropdown.' for 'Absence reason' (set to '<None>'). There is also a 'Hide absence reason' checkbox.

This will trigger an email to the employee advising them to enter their last day of sickness absence on their return.

For info - If the employee has any other absence recorded eg annual leave, you will get a message similar to that shown below. This is just a warning and there is no need to click on save again.



⚠ This absence overlaps with the following existing absence(s): 21/12/2017 - 22/12/2017 (Annual leave) 19/12/2017 - 19/12/2017 (Annual leave)
💡 Changes have been saved.

No further action is required from the line manager at this stage. The record will remain open until the employee returns to work and enters their return date.

In exceptional circumstances the manager/supervisor or sickness co-ordinator can enter the Absence end date on their behalf.

- Following 7 days absence the manager/supervisor and employee will receive an email reminding them of the requirement for a Drs certificate/fit note/medical certificate.

- Following 28 days absence the manager/supervisor will receive an email advising them that the employee is on a long term absence and to contact their HR Advisor.

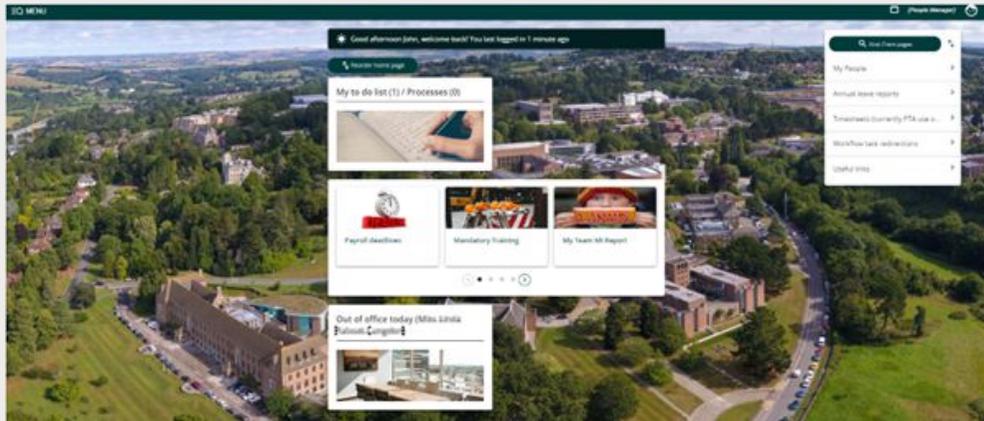
If you experience any problems please contact [HR Operations](#).

Recording and uploading medical certificates

The following shows managers/supervisors and sickness co-ordinators how to record dates and details of medical certificates and upload scanned copies to iTrent.

The employee should provide you with an original hard copy certificate signed by a medical professional for sickness absences exceeding 7 days.

Select 'My People' or 'People' from the home page.



Action:

- Select the appropriate individual.

- Select **Absence** from the 'Links' section at the bottom of the screen.

- Click on **New - Sickness certification dates** and select the appropriate period of sickness.

A screenshot of the 'Certification details' form in iTrent. The form has a dark header with 'Certification details' and a 'MENU' icon. On the right side of the header are three icons: a refresh icon, a print icon, and a red circle with a paperclip icon. The form fields are: 'Certification type' with a dropdown menu set to 'Doctor's certificate'; 'Certification reason' with a text field containing 'Slipped disc'; 'Final certificate' with a checkbox; 'Start date' with a date field set to '12/12/2019'; 'End date' with a date field set to '26/12/2019'; and 'Submission date' with a date field set to '16/12/2019'. Each date field has a calendar icon to its right.

- Enter the appropriate certificate type, reason (free text field), start and end date of the certificate and the date it was submitted.

• Within the 'Sickness certification dates' there is a *notes* field (see circled in red above) where additional details eg reasonable adjustment etc can be recorded.

- Click *Save*.

- Scan a copy of the sickness/medical certificate and return the original to the employee.

- Click on **Upload new sickness certificate**

- If there is more than one period of sickness, the dates will flash and you should select the appropriate sickness dates. The following screen will load, be patient if it's not immediate.

Document attachment details New MENU

Document Fit note - 27/01/2022

Document type Absence - Sickness certification

Last updated date

Last updated time

Filename

Select a file ... Choose File No file chosen

SAVE

-Against the 'Document' field enter a description of the document eg 'Fit note - 27/01/2022'.

- Select 'Absence - Sickness certification' from the Document type' drop down.

- Click on 'Choose File' and search for the scanned certificate.

- Click 

If the 'May be fit to work' box on the certificate has been ticked or the medical professional has recommended reasonable adjustments, you should contact your HR Advisor.

You can view historic certificate date details by clicking on  and the actual certificate by clicking on 

If you experience any problems, please contact [HR Operations](#).

Recording phased returns following sickness absence

After a long term absence Occupational Health may recommend that an employee's return to work be phased to help restore confidence and help them readjust gradually to work.

A phased return is where less than the contractual hours are to be worked for an initial, defined period (not normally exceeding three months).

A phased return must be properly structured, and the OHA/HR Partner/Advisor will offer advice and guidance to managers to assist in drawing up a return to work programme for the employee.

A phased return may also be recommended by the employee's GP on their fit note.

Where a phased return is recommended, issues to be considered by the manager, with the advice of their HR Partner/Advisor, include the nature of the work, the hours to be worked, remuneration and the duration of the arrangement.

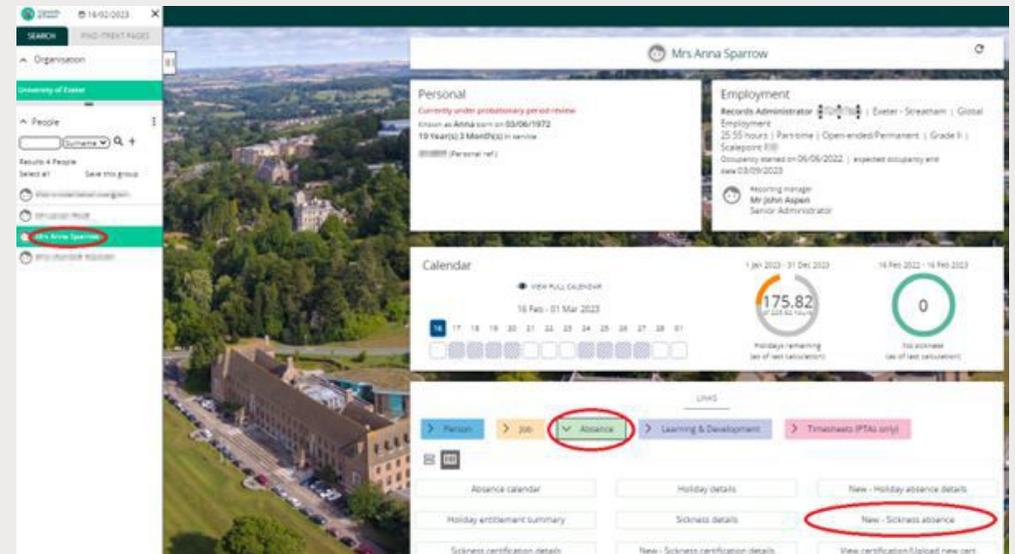
Where Occupational Health have recommended a phased return to work, the employee may use any untaken annual leave entitlement or carried forward untaken statutory leave on the days when they will not be attending work.

Alternatively this may be counted as sick leave or unpaid leave or as part-time work, according to the circumstances and the employee's entitlements. (Unpaid leave and part-time work may affect pension contributions). These arrangements should be confirmed in writing.

If the Faculty/Division does not deem a phased return to be reasonable then a discussion needs to take place with the line manager and HR Partner/Advisor to consider business as well as employee needs. There is no right for an employee to have a phased return to work and this option should only be used in exceptional cases.

Recording phased return:

- Select the appropriate individual.



- Select **> Absence** from the 'Links' section at the bottom of the screen

Select **New - Sickness absence**

Sickness absence details New ▼ MENU ↻ 🖨 📎

Sickness period

Sickness period* ▼

Absence start

Absence start date* 📅

Absence start type ▼

Hours absent

Absence end

Expected end date 📅

Absence

Absence type* ▼

Absence reason* ▼

Hide absence reason

Authorisation

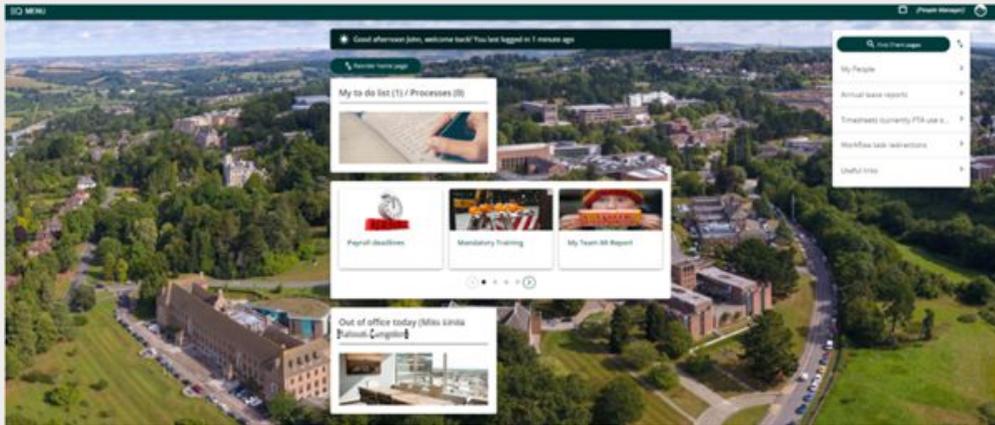
- 'Sickness period' - Select either 'Full day' or 'Part day' as appropriate
- 'Absence start date' - Enter as appropriate
- If you selected 'Part day' complete 'Absence start type' - Select either 'Part day', 'Half Day PM' or 'Half Day AM' as appropriate.
- 'Hours absence' - If you selected 'Part day' enter the number of 'Hours absent' - Enter the number of working hours absent in hours and minutes, eg 3:30 for 3 hours and 30 minutes.
- 'Expected end date' - There is no requirement to complete this field for phased returns.
- 'Absence type' - Select 'Sickness (Phased return)'
- 'Absence reason' - Enter as appropriate
- Click

① For phased returns you will be required to enter each day separately.

Ending a sickness absence on behalf of an employee

[Log in to iTrent](#) (if you have more than one role select People Manager).

Select 'My People' or 'People' from the home page.



Action:

- Select the appropriate individual.
- Select **> Absence** from the 'Links' section at the bottom of the screen.
- Select
- Select the current sickness absence period.
- Enter the last day of sickness in the 'Absence end date' field.

A screenshot of the 'Sickness absence details' form for Mrs Anna Sparrow. The form is divided into several sections: 'Sickness period' with a dropdown set to 'More than one day'; 'Absence start' with 'Absence start date' (21/02/2023) and 'Absence start type' (Full day); 'Absence end' with 'Absence end date' (22/02/2023), 'Absence end type' (Full day), and 'Expected end date' (empty); and 'Absence' with 'Absence type' (Sickness), 'Absence reason' (Cold, influenza, infectious dis), and 'Position' (Records Administrator (06/06/2022, P69227B) (Current)). At the bottom are 'Save' and 'New' buttons. A red arrow points to the 'Absence end date' field.

This will trigger an email to the employee advising them that their sickness absence has been closed.

If you experience any problems please contact [HR Operations](#).