UNIVERSITY of WORCESTER

Standard Operating Procedure

iTrent Team Administrator

Contents

Navigating iTrent 3
Company News 4
Other Tiles 4
Using the Search Facility 4
Advanced Search 5
Summary tiles 6
Sections and pages 6
Section 2 – Viewing personal information 8
Personal Information 8
Job Information 9
Position details 9
Hours and basis 11
Section 2 – Absence 15
Sickness absence 15
Recording sickness absence 15
Exporting sickness absence list to Excel 17
Attaching documents to sickness absence record 17
Pattern override 18
Sickness entitlement summary 19
Annual leave 21
Recording annual leave 21
Pattern override 23
Holiday entitlement summary 24
Annual leave using My View and Manager View 26
Bank Holidays 32
Crediting Bank Holidays 33
Other absence 34
Paid leave 37
Pattern override 38
Unpaid leave 39
Pattern override 40
Research Leave 40
Absence Calendar 41
Peer Groups (viewing Team's absences on a calendar in MyView) 43
Section 3 – iTrent Reports 46
People reports 46
Absence reports 49

Section 1 – Introduction to iTrent

iTrent is the University's HR and Payroll system. Once fully implemented, it will be used to manage all activity relating to:

This guide is for Core HR only and relates specifically to the role of **Team Administrator**. This guide will help you to navigate iTrent and support you to complete processes effectively.

When using the Team Administrator role, you are using a version of iTrent known as 'Electric Theme'. Electric Theme is also used by the following users:

- HR team (using the role **HR Administrator)**
- Payroll team (using the role of **Payroll Administrator**)
- HR Business Partners (using the role of **HRBP**)
- Line managers (using the role of **Manager View**)
- Some colleagues in Finance (using the role of **Finance Administrator**)
- Duty Managers (using the role of **Duty Manager**)

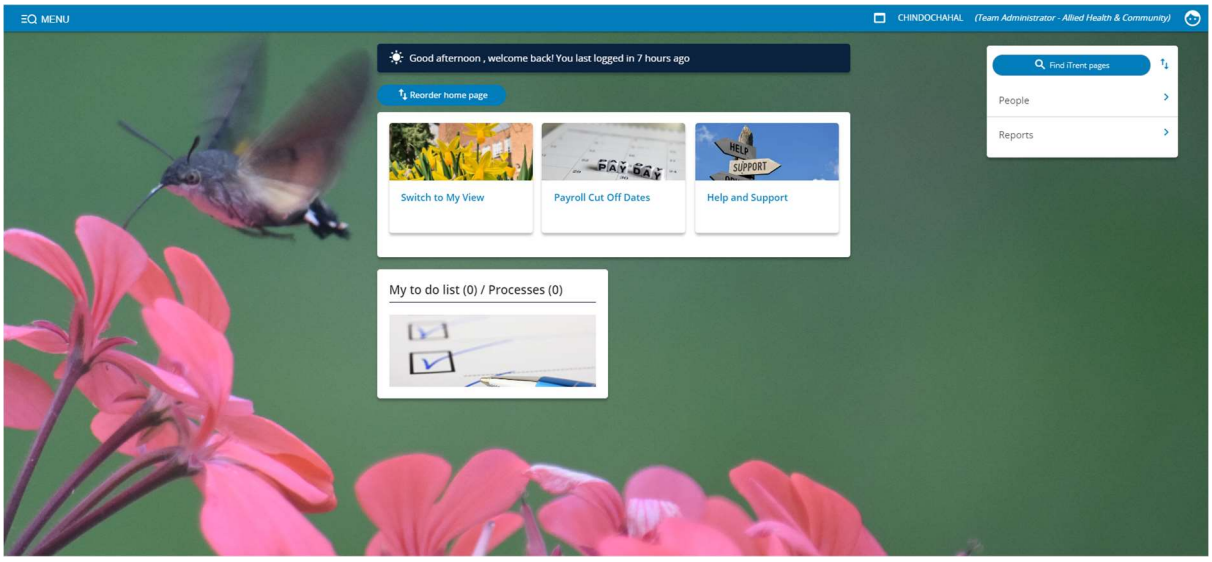
There is another version of iTrent known as 'Employee Self Service'. Most people in the University will use Employee Self Service (which we call **My View)**, and the functionality will differ if you are an employee or other type of worker.

Both versions have their own unique URL (web-link).

Access iTrent Electric Theme using this URL, and save this on your Favourites Bar:
https://ce0816li.webitrent.com/ce0816li_web/itrent_wrd/run/etadm001gf.main

Navigating iTrent

Your home screen contains a series of tiles which are links to information and tools. A menu is displayed on the right-hand side of the screen. There is also a menu link on the left-hand screen.



Let's look at each area individually.

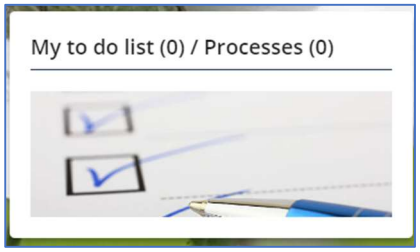
Company News

These tiles are used to relay useful information to the colleagues in the University and can are maintained by HR and Payroll teams.

The tile called *Switch to My View* is a permanent tile which is visible to all users of the 'Electric Theme'. The link in this tile takes the user to My View, where they can view their own profile, access their payslips, update their person information and request annual leave.

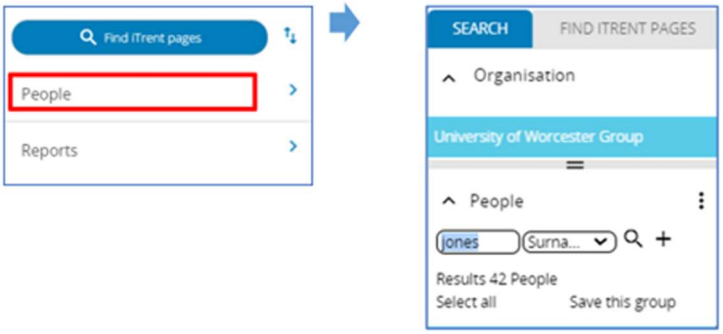
Other Tiles

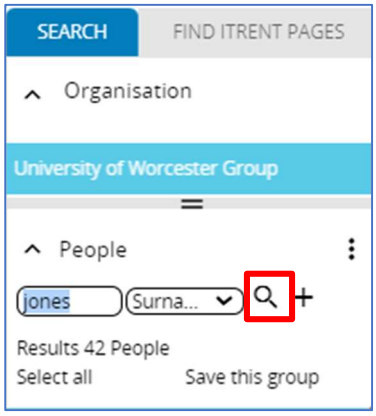
The remaining tile is a quick link to *My to do list,* where you can view your system generated notifications.



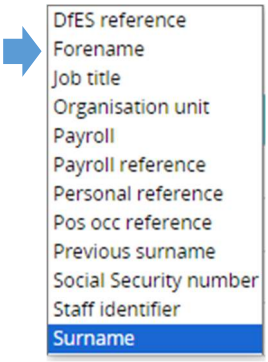
Using the Search Facility

Generally, you will use this menu to find your people and navigate to relevant pages of iTrent.





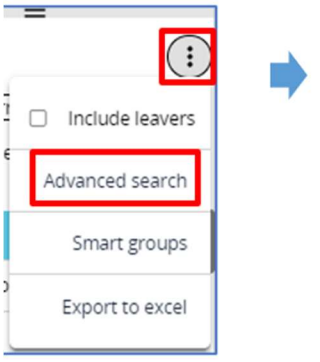
Find an employee to view by typing the surname into the search field.

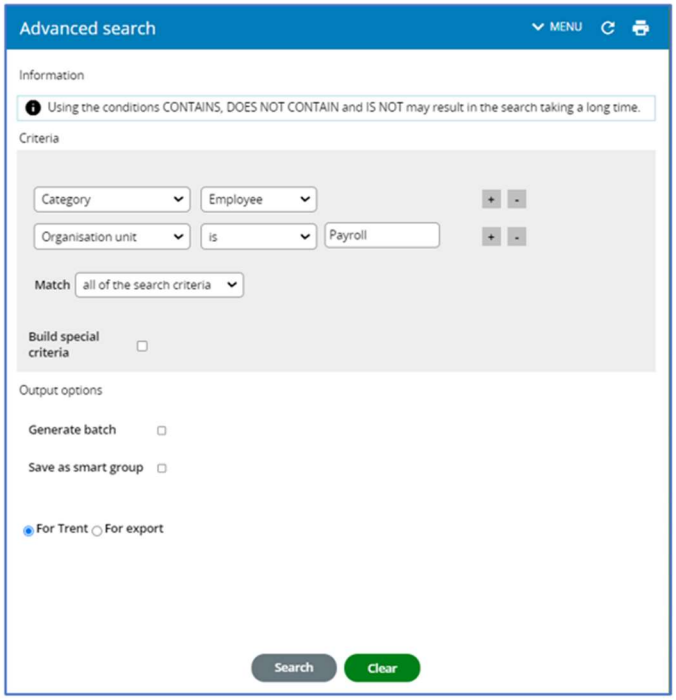


Or you can use other criteria to search by selecting the down arrow and using a different parameter for your search.

Advanced Search

The *Advanced Search* can be accessed from search box using the 3 dots, and then selecting *Advanced search*. You can then find your person using more than one parameter to fine-tune your search, such as finding all people in a particular department whose category is *Employee*.





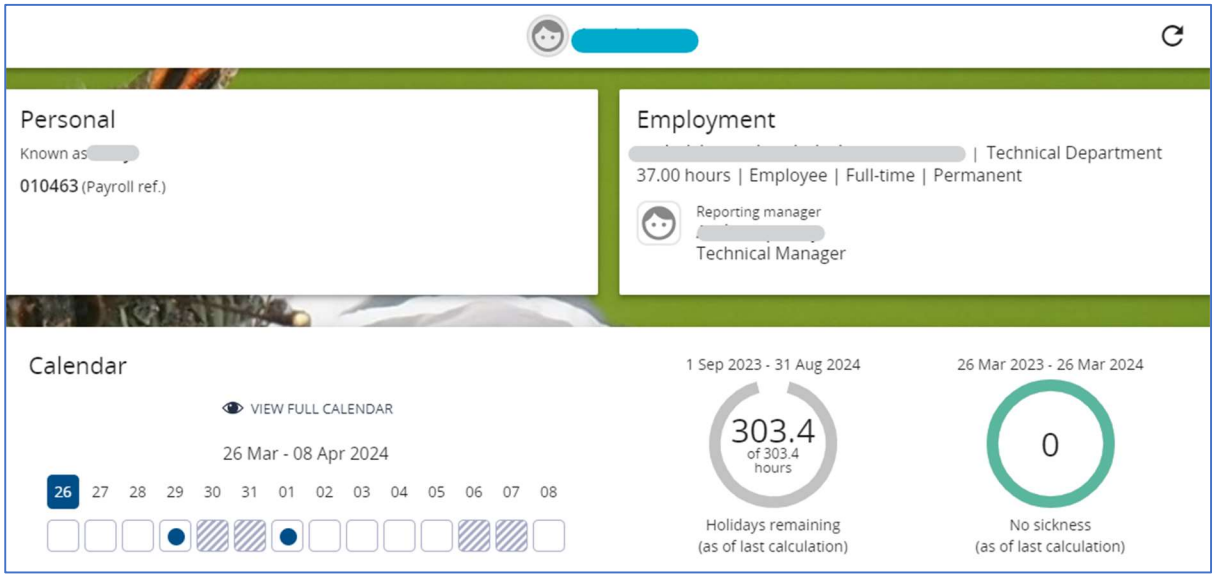
Summary tiles

The screen will display your person's profile page, which consists of the summary tiles and Sections and Pages.

The summary tiles display **Personal** and **Employment** information.

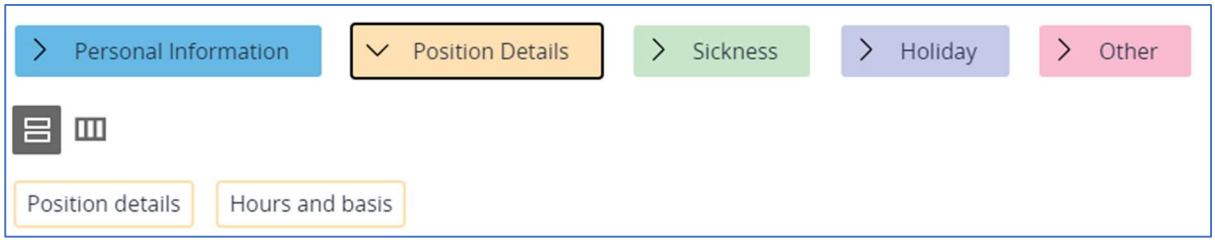
There is also the quick link to the **Calendar**, which is explained in detail later in this guide.

The two wheels display the holiday summary and sickness absence summary.



Sections and pages

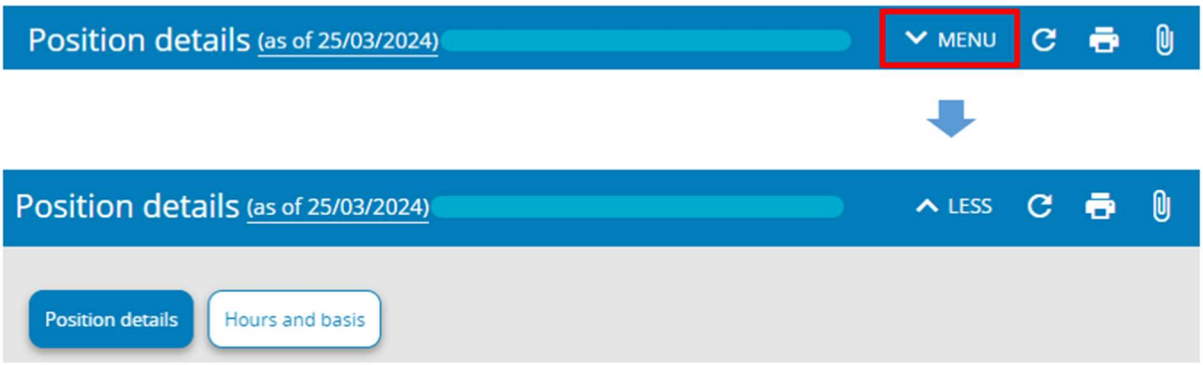
Below the summary tiles, you will see a series of coloured boxes which each represent a **Section** (a grouping of pages that are of a similar category).



Each section has a list of **Pages** that hold information about the person.

To open a page, click on the relevant button and the page will display.

Once you are in a page (in this example, *Position details*), you can view the other pages within the Section by clicking on the menu link that is visible in the blue bar on the page. This will expand to show the other pages available in the same Section.



To return to the main menu to see all sections, click on the person's name from the top of your screen.

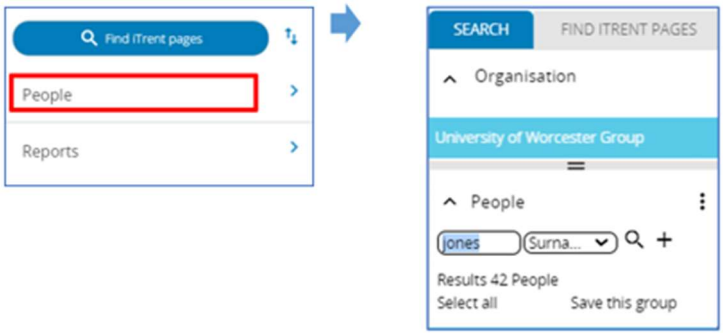
To return to the home screen, click on the iTrent logo from any page or screen.

Section 2 – Viewing personal information

Personal Information

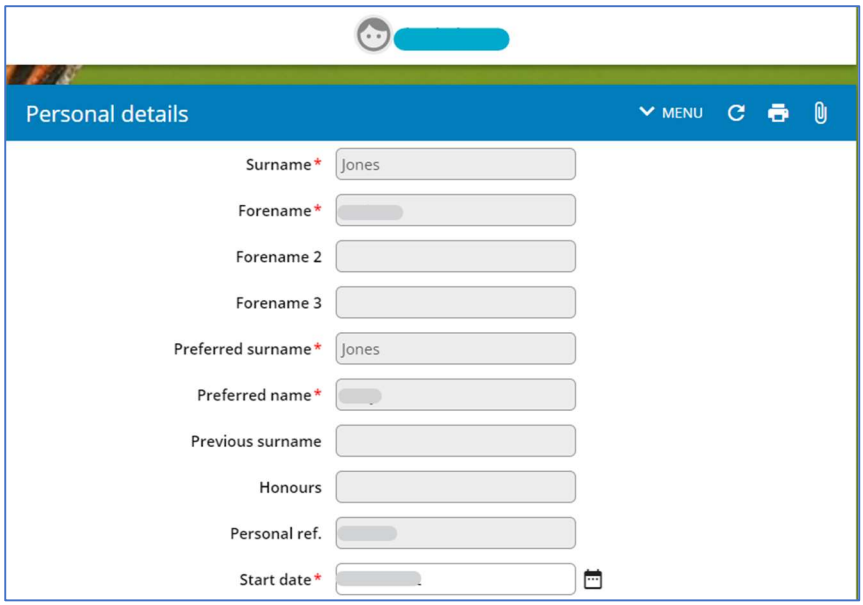
Some basic personal details can be viewed about your person. To access these, follow this navigation.

From the menu on the home screen, select *People* and then search for your person.



From the Section called **Personal Information**, select *Personal details*.

The following page will display. The information is here is read-only so you cannot amend it. The person can maintain their preferred names using *My View,* but the rest of the information is maintained by HR Operations.



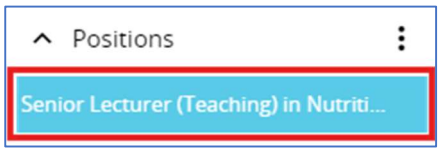
Job Information

This section contains information about the person's job. We will look at each one in turn.

Position details

A Position is the role that exists in the University's organisations. People occupy Positions, else they are vacant. Everything about the role (such as salary, holiday entitlement and other terms and conditions) is recorded against the Position.

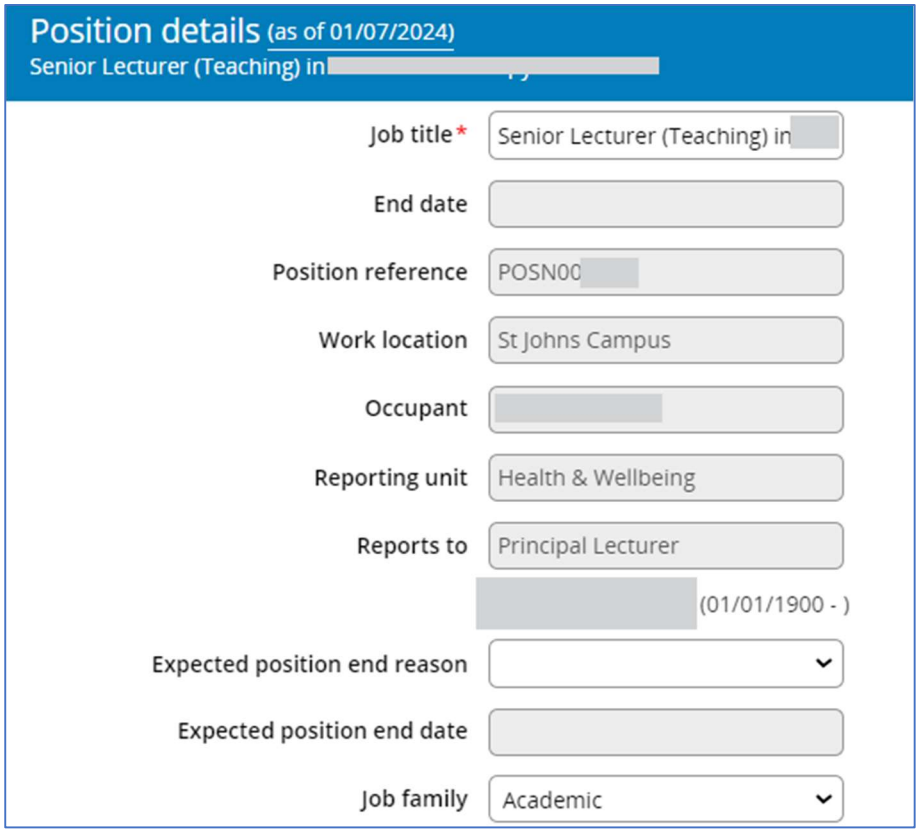
Select the link ***Position details***.



You will see one or more active Positions displayed on the left-hand menu. Select one Position to view the details.

At the date screen, select today's date and select **OK**.

The following page will display, showing job title, work location, current occupant, and reporting manager details.



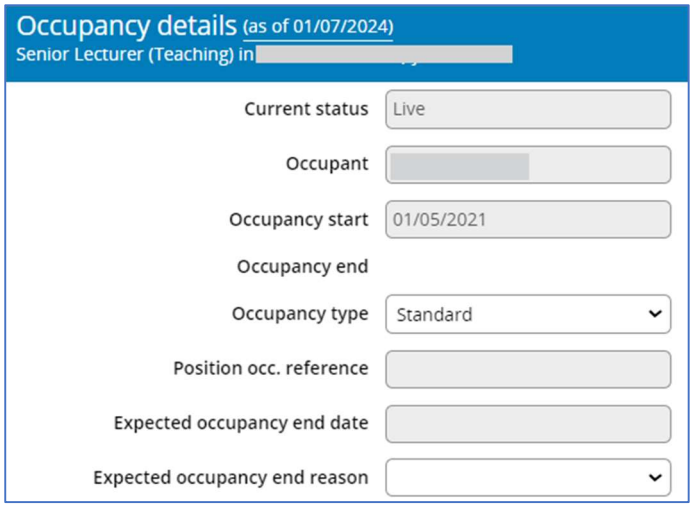
All Positions as at the time of going live commence on 01/01/1900.

The fields **Expected position end reason** and **Expected position end date** will only show values if the role is intended to be temporary.

Occupancy Details

Whilst the Position is the role, occupancy refers to the period that a person occupies that Position.

This page shows details of the occupancy; the occupant of the position, the date from which they occupy the Position and (if in the role temporarily) that this occupancy will end.

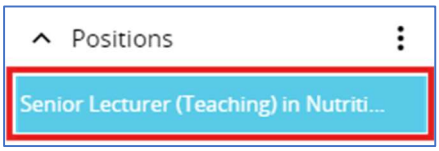


Note: if there is an *Expected occupancy end date*, the line manager will receive a reminder at 120 days before, 90 days before, 60 days before and 30 days before this date to ensure they are aware of this expected date and understand the action that they need to take.

Hours and basis

This page holds information about the working hours and employment basis.

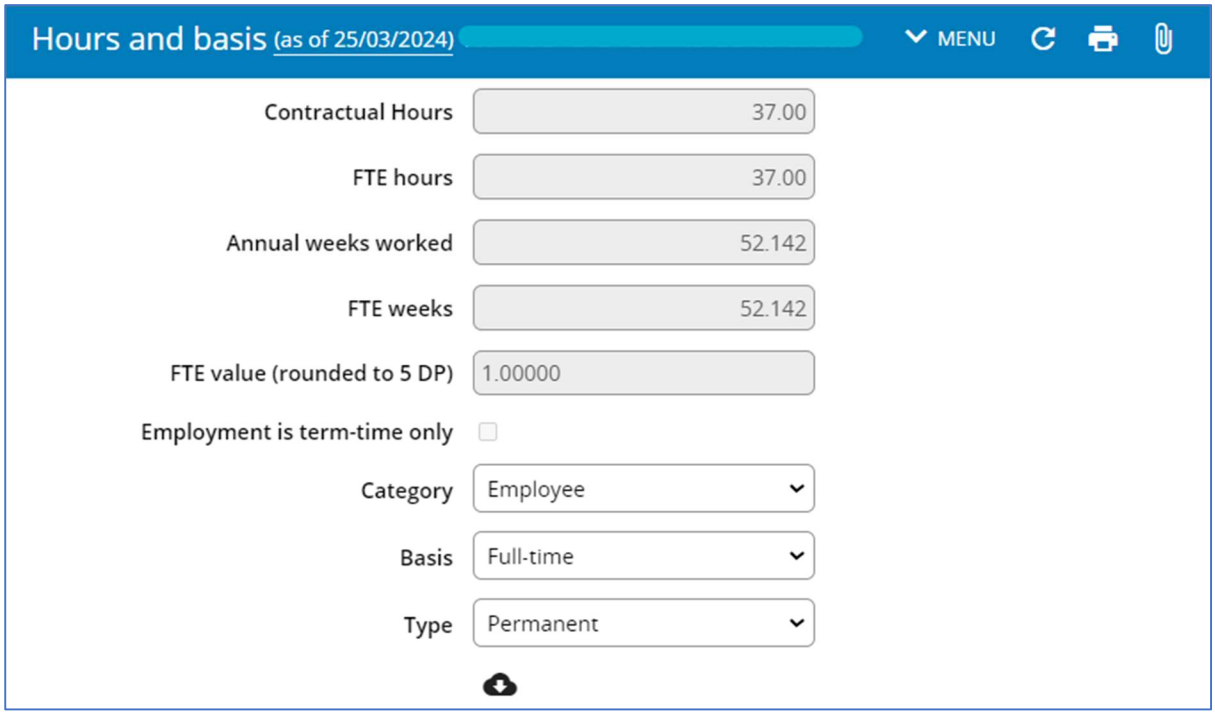
Select the link ***Hours and basis***.



You will see one or more active Positions displayed on the left-hand menu. Select one Position to view the details.

At the date screen, select today's date and select **OK**.

The following page will display.



The information on this page is summarised as follows:

Contractual hours: This is the person's weekly hours worked.

FTE hours: This is the full-time equivalent working hours, which is always be 37.

Annual weeks worked: This is the number of weeks the person is contracted to work. For term time people, this will be less than the full time equivalent.

FTE Weeks: This is the full-time equivalent weekly weeks, which is always 52.142. There are 52 weeks and one day in a year, hence the decimal point.

FTE value: This the person's full-time equivalent value, calculated using the information in the four fields above.

Employment is term-time only: This will be checked if the person works term-time.

Category: Will show you whether Position occupier is one of the following:

Affiliate
Apprentice
Associate Lecturer
Emeritus
Employee
External Examiner
Honorary Contract
Off-payroll worker
Pensioner
Student Worker
Worker

Basis: Will show you whether the Position occupier is one of the following:

Full-time
Hourly paid
Other
Part-time
Term time

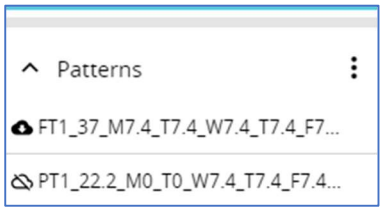
Type: Will show you whether the Position occupier is one of the following:

Casual
Fixed Term
Non-employed
Permanent

Pattern Details

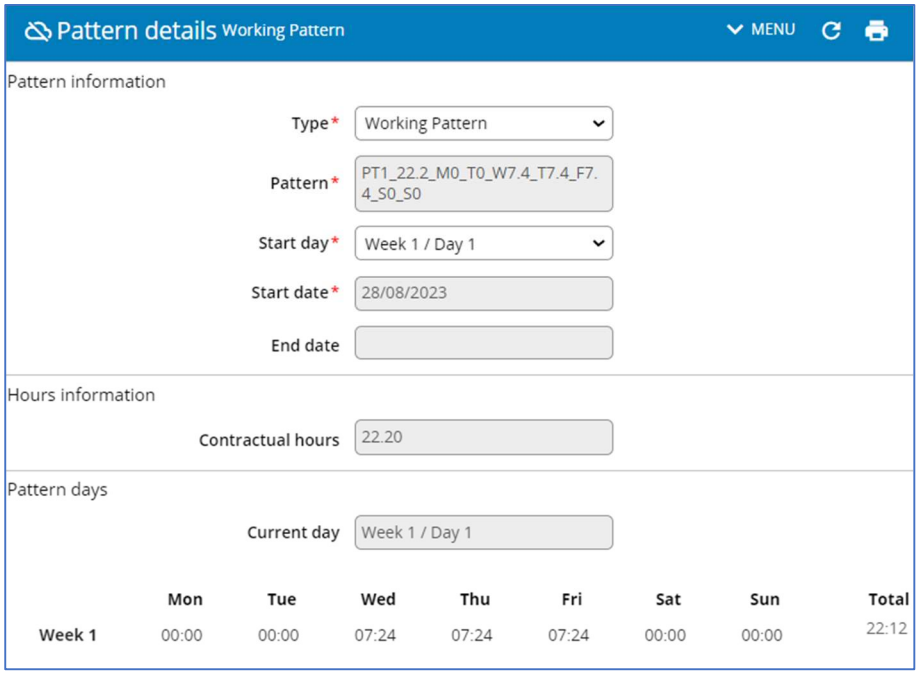
The final link takes you to the work pattern information. The work pattern show which days of the week the individual works, and the hours worked each day. Work patterns are used to calculate the amount of time to be deducted from annual leave balances when holiday is taken, and the number of days absence for sickness and other absences. They are therefore important for ensuring absence is calculated corrected, and sickness and unpaid leave is reflected correctly on payslips.

You will see one or more patterns on the left-hand menu. Select the last one in the list on the left-hand menu.



Select the last one in the list as this is the most recent and active work pattern.

In the example below, the employee works 22.2 hours per week on Wednesday, Thursday and Friday each week.



If an employee works a 'flexible work pattern' (in other words, the days in the week that they work can change), we record the pattern that they most frequently work. The work pattern can be adjusted when recording absences using the *Pattern Override* feature, which is explained in the absence sections of this user guide.

Section 2 – Absence

Leave and absence is generally managed locally using My View and Manager View. At the time of launch of iTrent, only annual leave can be requested using My View. All other types of absences are recorded by line managers using Manager View, or by the holder of the Team Administrator role.

Some absences will be recorded by HR only.

This section will show you which absences you can manage using the Team Administrator role and how to record leave and absence accurately.

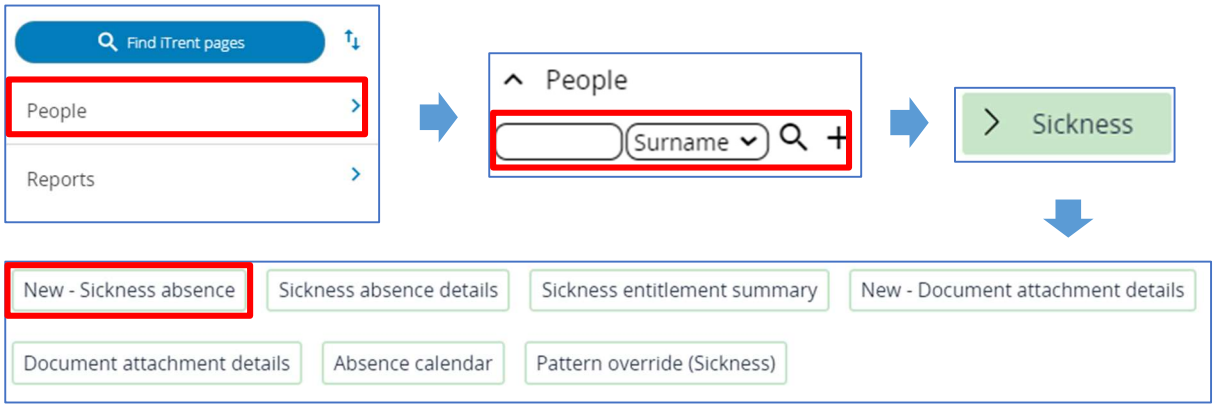
Absences are grouped on your iTrent view in the highlighted sections.

Sickness absence

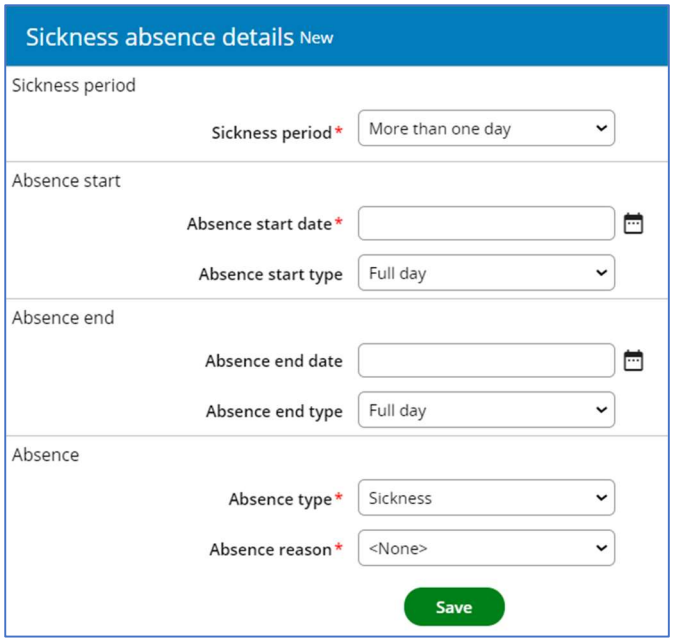
Recording sickness absence

This absence is available to line managers and holders of the Team Administrator role to input directly into iTrent.

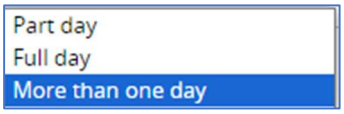
From the menu on the home screen, select *People > [select employee] > Sickness > New - Sickness*:



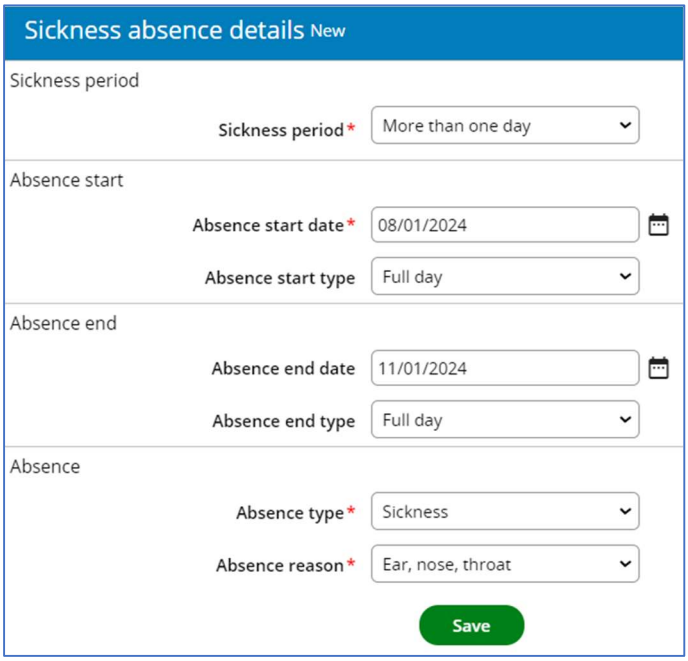
The **Sickness absence details** page is displayed.



The **Sickness period** field provides 3 options. The page will update depending on the selection.



If *More than one day* is selected, then you will need to input the **Absence end** details.

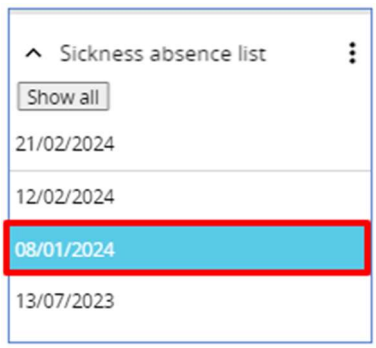


In this example, we have recorded an absence spanning four days.

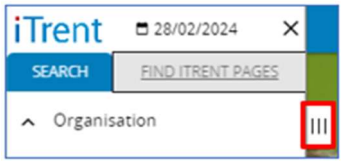
When all details have been entered, select **Save**.

An absence calculation occurs overnight, at which time the absence total will appear on the employee's home page.

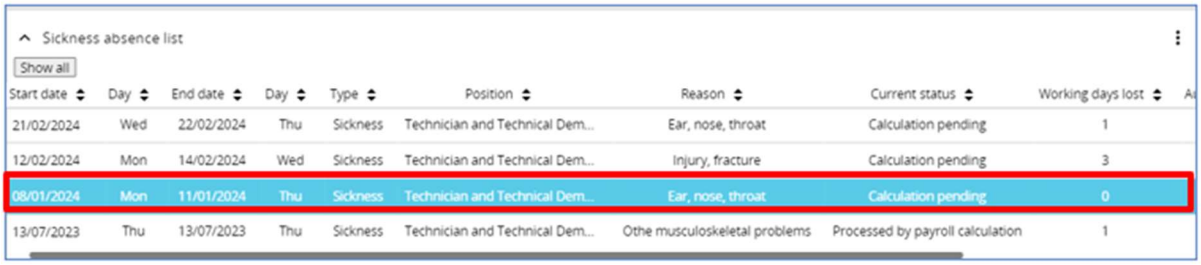
Once saved, the absence appears in a list on the left-hand side bar along with other sickness absence dates recorded in iTrent.



You can expand the left-hand bar using this tab:

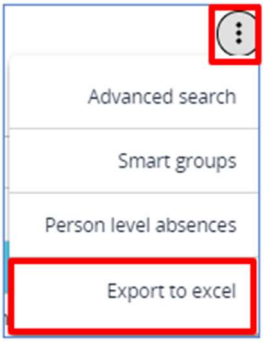


Once expanded, you can view more information about the sickness absences recorded for the employee including *Working days lost.* In this example, we have not yet calculated the absence, so this is showing as '0' days lost. Once the iTrent calculation has occurred this will show 3 days.



Exporting sickness absence list to Excel

This list can be used as a report of sickness absence of the employee and can be exported to Excel. Select the 3 dots as shown below and select *Export to excel*.



Attaching documents to sickness absence record

There are a number of documents that may need to be attached to a sickness absence record, namely self-certification form, a fit note or a return-to-work interview form.

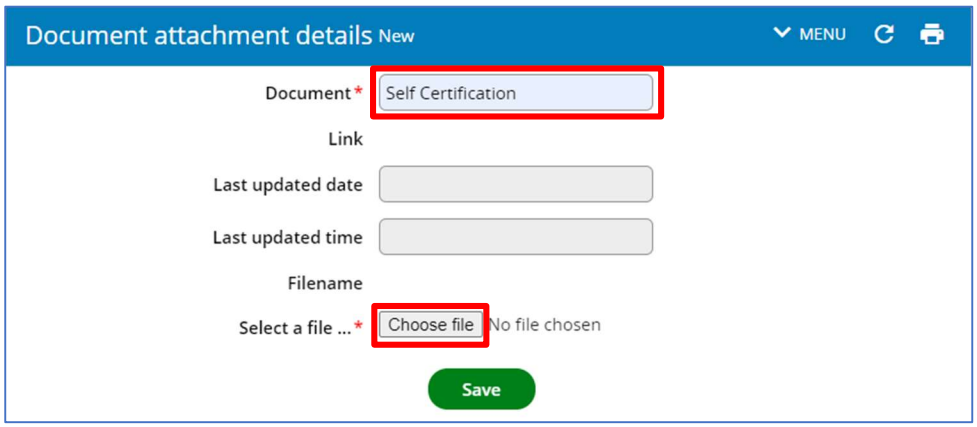
This can be done in one of two ways.

Select the paperclip icon from the menu bar of the sickness absence screen:

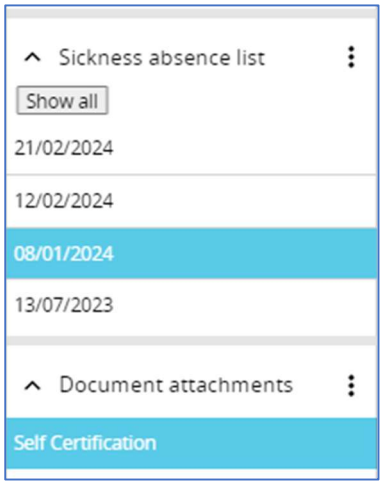
OR expand the menu and select *New – Document attachment details*.

Both methods will display the **Document attachments details** page. The document to be attached should be pre-scanned and saved to your desktop.

On this page, give the document a name in the field **Document**, and attach the document using the *Choose file* button. When done, select **Save**.



Once saved, the document can be seen listed in the left-hand bar. You will need to select the relevant absence to see the documents attached within it.

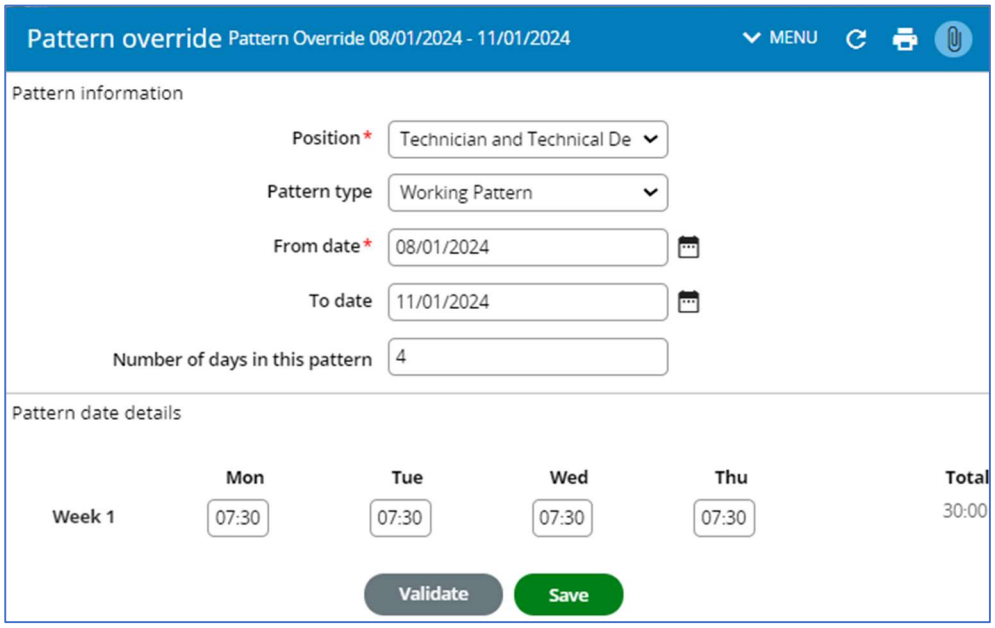


Pattern override

iTrent calculates time lost based on the employee's working pattern. If the employee was due to work on the day/days absent according the work pattern, they will be counted as absent days. In rare circumstances, and usually only if the employee works a flexible work pattern or fractional days, the work pattern may need to be amended to record the correct number of days lost. This is known as 'pattern override'.

To check the work pattern, expand the menu and select *Pattern override (Sickness)*, ensuring that the relevant absence is selected from the left-hand bar.

This will display the **Pattern override** page. If there are any days within the period that should not be counted in the absence total, then change the hours to *zero* for that day, select **Validate** to check the amendment, and **Save** when you are done.

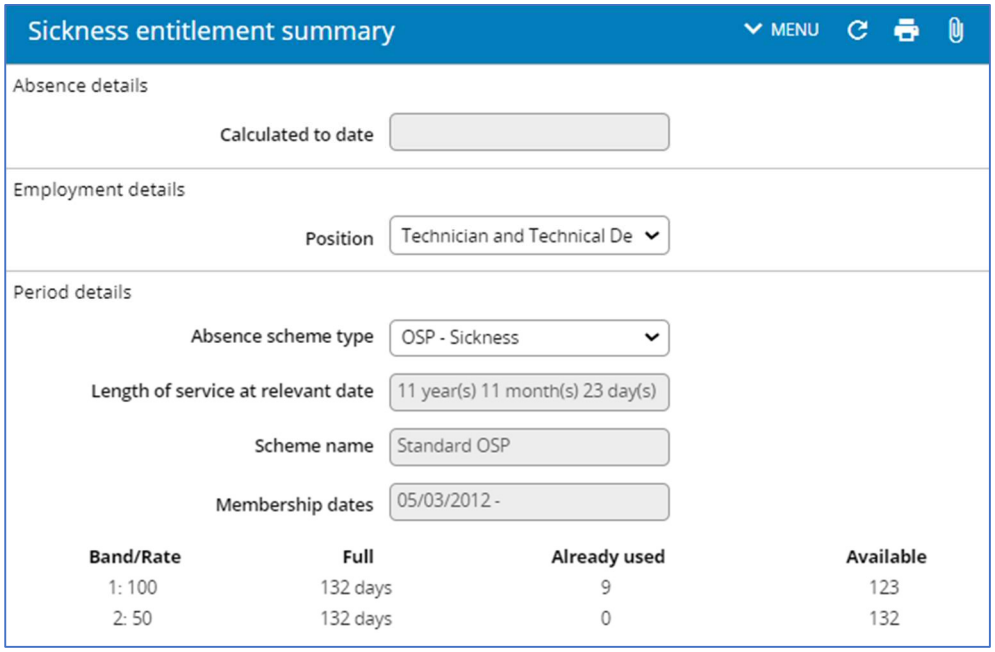


This action only amends the work pattern within the period of absence and ensures that the number of days absent is recorded accurately. The employee's work pattern on either end of the absence stays the same.

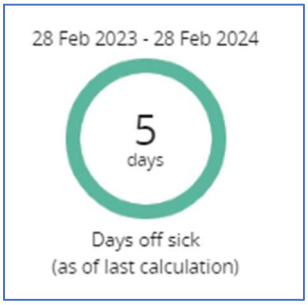
Sickness entitlement summary

The **Sickness entitlement summary** page can be accessed from the menu on the home screen.

This page displays information about the employee's sick pay entitlement the number of days used at the full and half rate of pay, and the number of days remaining.



On the employee's profile page, you can see a summary of the total sickness absence in the 12-month period up to the current day.



Clicking on this image will also display the sickness entitlement summary page.

Annual leave

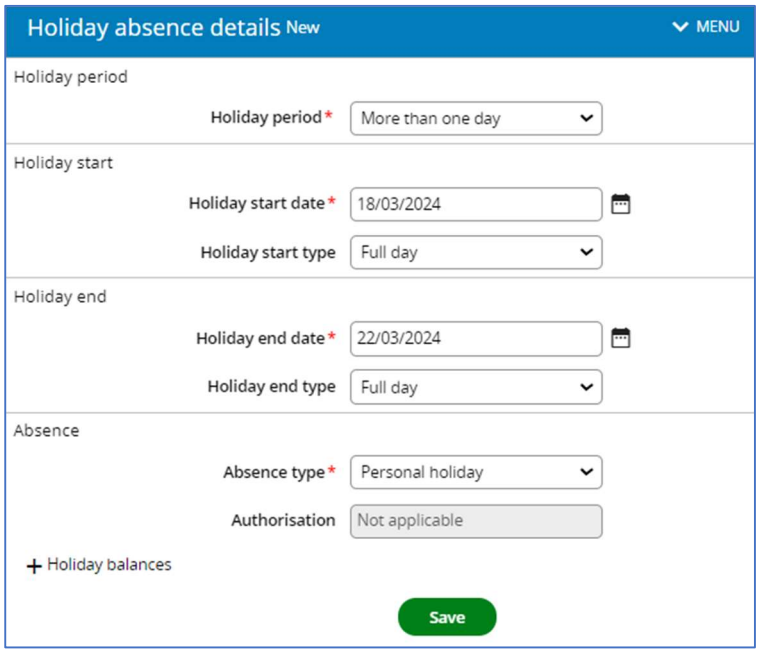
Recording annual leave

Annual leave is requested by employees via My View, and reviewed by line managers using Manager View. If approved, the absence is recorded in iTrent, and no further intervention is required. The self-service process is described below in the section called *Annual leave using My View and* .

Annual leave can be input manually by line managers using Manager View, holders of the Team Administrator role or by HR Administrator using this navigation.

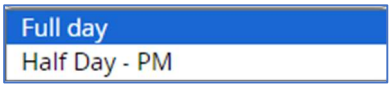
From the menu on the home screen, select *People > [select employee] > Holiday > New - Holiday absence*:

The **Holiday absence details** page is displayed.

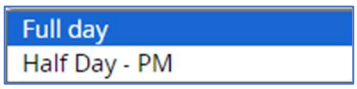


Holiday should only be booked in half days or full days.

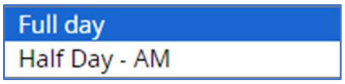
The **Holiday period** field provides 3 options. The page will update depending on the selection made.



Select the correct option and complete the holiday page, then select **Save**.



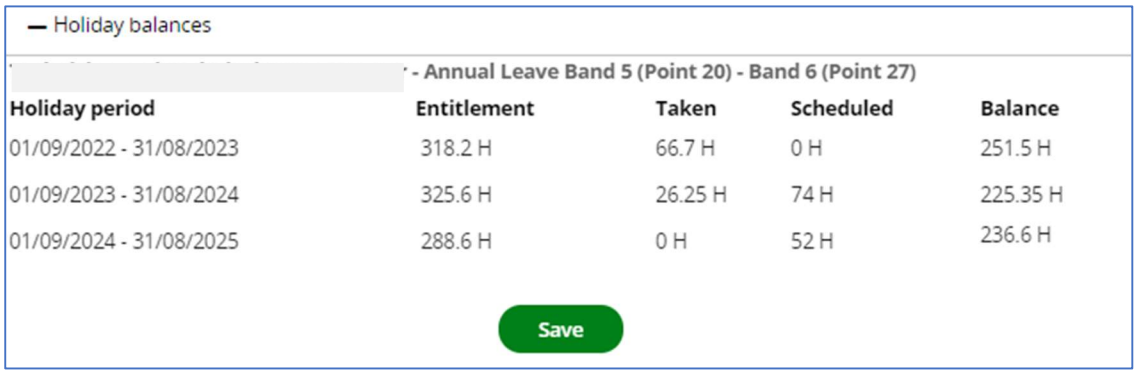
If you have selected *More than one day* or *Part day*, you will need to provide the **Holiday start type**. Select either *Full day* or *Half Day – PM.* Half day is calculated from the working pattern.



If you have selected *More than one*, you will need to provide the **Holiday end type**. Select either *Full day* or *Half Day – AM.* Half day is calculated from the working pattern.

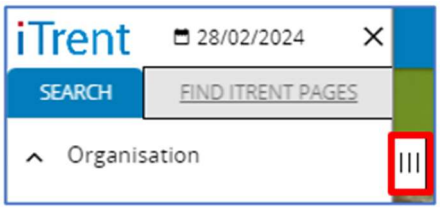
You can view **Holiday balances** from this page. Select the '+' sign to see the holiday entitlement, holiday taken/scheduled and holiday balance here. This is a summary of the previous, current and following leave years

Note: the amounts below are for demonstation purposes only and do not reflect the University's holiday schemes.



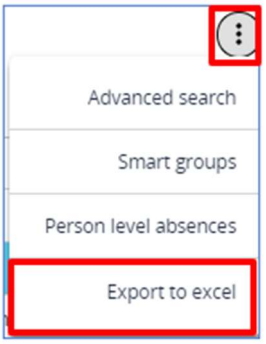
Once you have saved the record, the leave appears in a list on the left-hand side bar along with other leave dates recorded in iTrent.

You can expand the left-hand bar using this tab:



Once expanded, you can view more information about the leave recorded for the employee including *Working hours lost.* If your record shows '0' hours, this will update once the absence calculation has occurred.

This list can be used as a holiday report for the employee and can be exported to Excel. Select the 3 dots as shown below and select *Export to excel*.

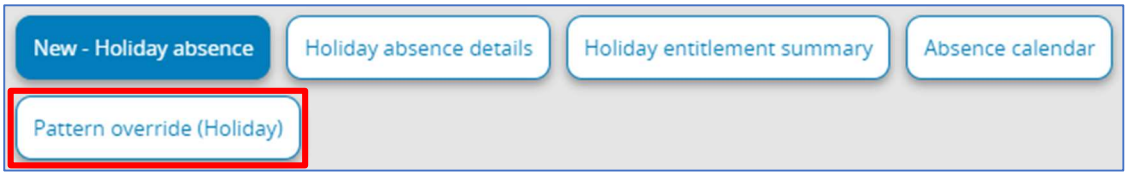


Also note that the employee will receive an email notification informing them that a period of leave has been added for them:

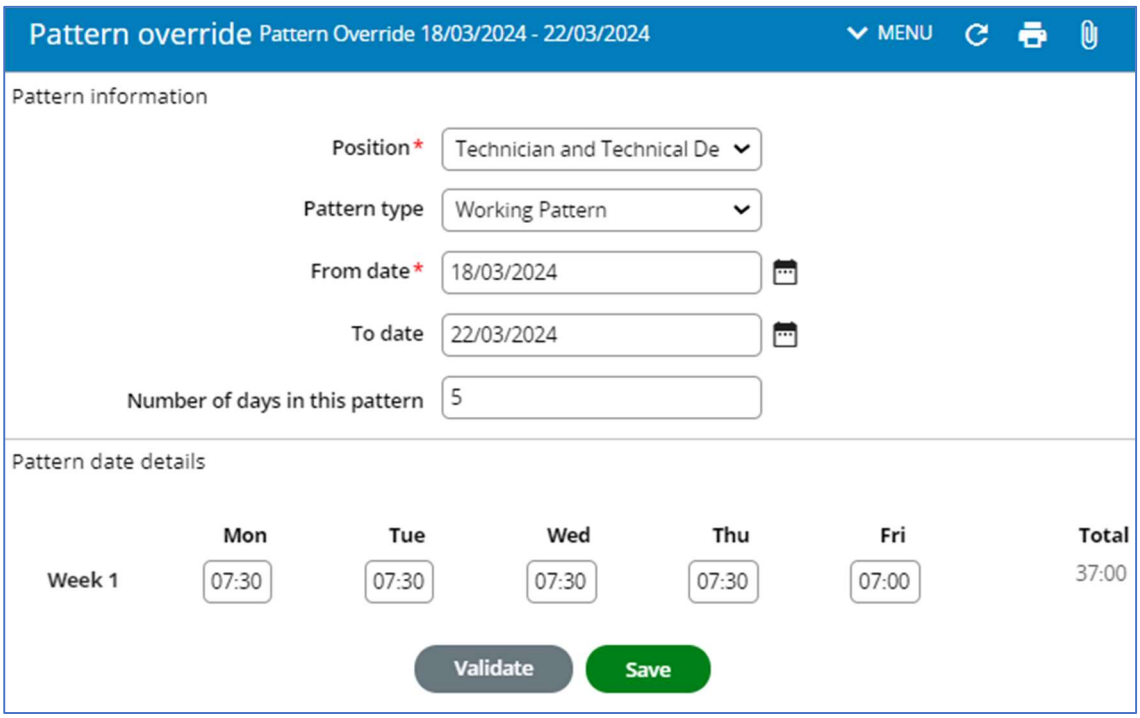
Pattern override

iTrent calculates time lost based on the employee's working pattern. If the employee was due to work on the day/days absent according the work pattern, they will be counted as absent days. In rare circumstances, and usually only if the employee works a flexible work pattern or fractional days, the work pattern may need to be amended to record the correct number of days lost. This is known as 'pattern override'.

To check the work pattern, expand the menu and select *Pattern override (Holiday)*, ensuring that the relevant absence is selected from the left-hand bar.



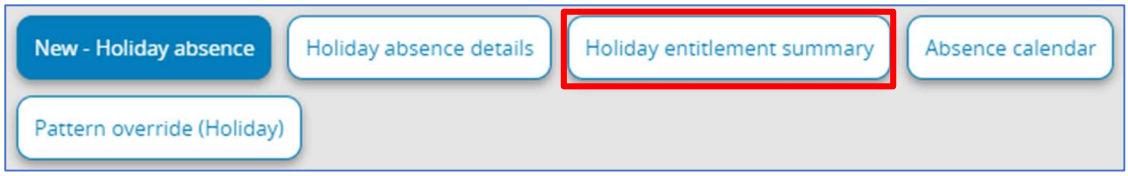
This will display the **Pattern override** page. Check and update the work pattern to correctly reflect the hours that would normally have been worked on each day. Select **Validate** to check the amended total hours, and **Save** when you are done.

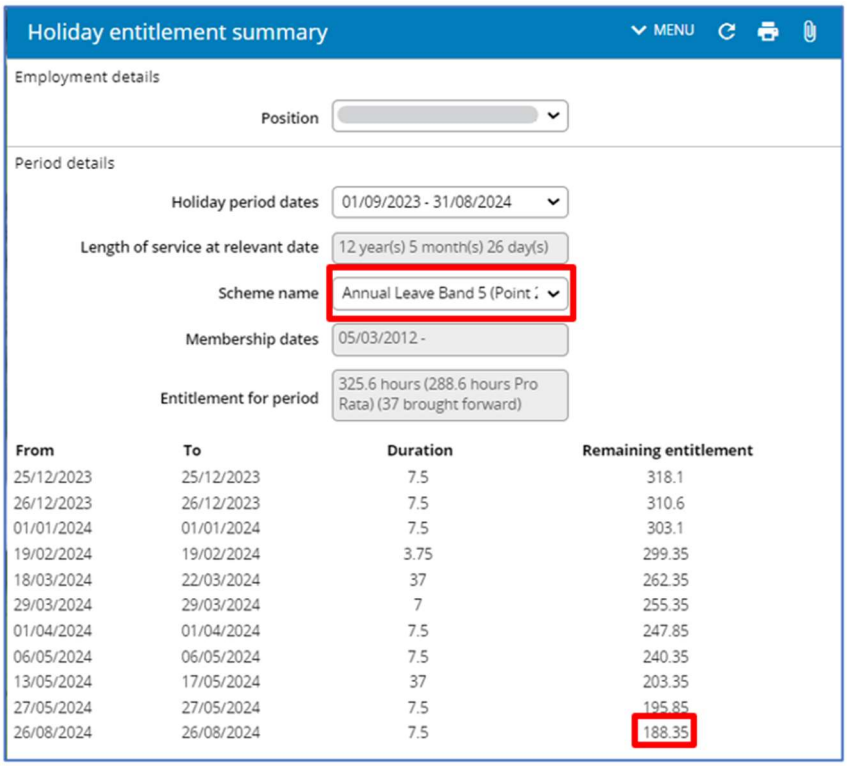


This action only amends the work pattern within the period of absence and ensures that the number of hours to be deducted from the leave balance is accurate. The employee's work pattern on either end of the absence stays the same.

Holiday entitlement summary

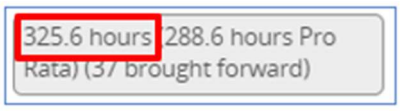
The **Holiday entitlement summary** page shows the employee' annual leave entitlement and balance. This can be accessed by expanding the Menu bar and selecting **Holiday entitlement summary**.



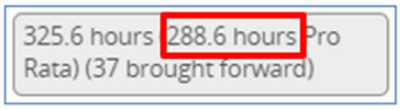


This section shows the employee's holiday scheme. It can be updated from page called T&C Details.

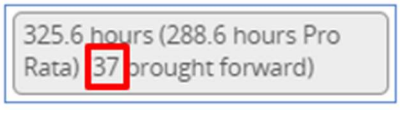
This section displays holiday already booked/taken and shows a reducing balance. This final figure is the remaining leave hours.



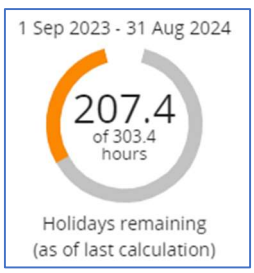
This is total sum of hours that the employee can book. It is pro-rata for part time hours, and part year changes in contractual hours.



This is the full-time equivalent holiday entitlement (including Bank Holidays and closure days but excluding carry over).



This is the total sum of hours carried forward from last year.



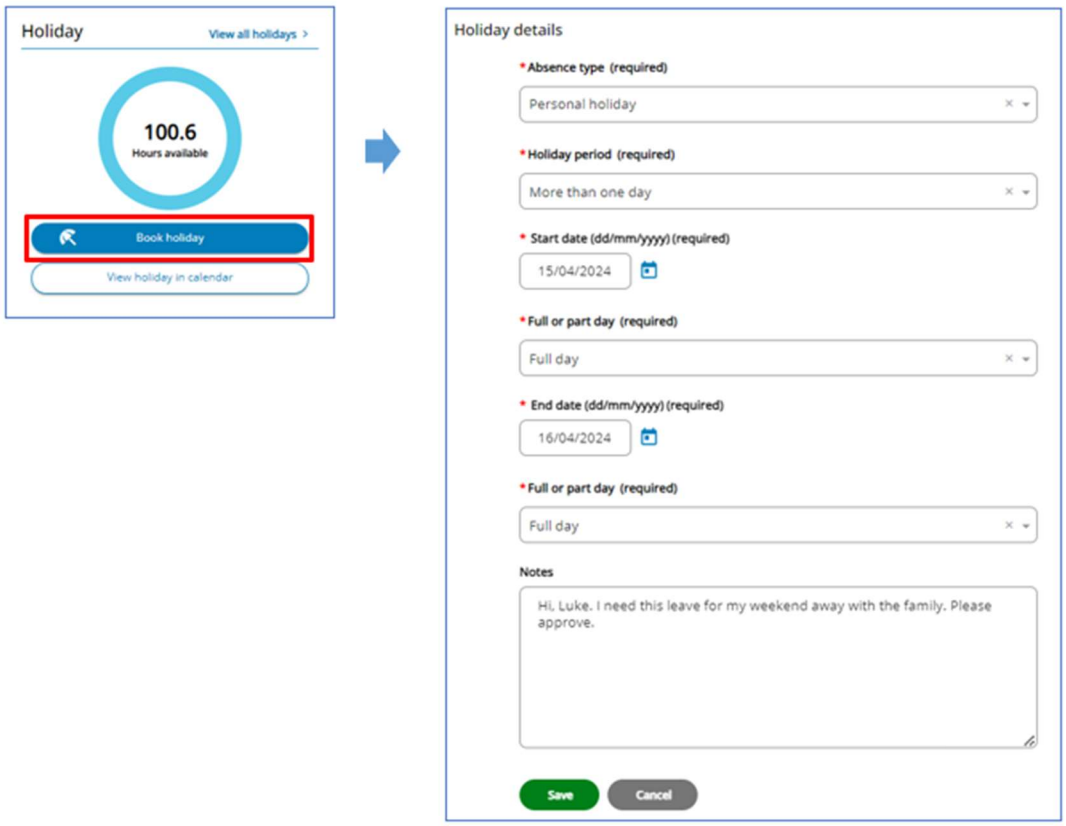
Remember, you can also see holiday summarised on the person's home page on the 'holiday wheel'.

Annual leave using My View and Manager View

Making a new request

All employees can request annual leave via My View for their line manager to review.

From the home page of My View, selecting the **Book holiday** button on this tile will open the holiday booking form.



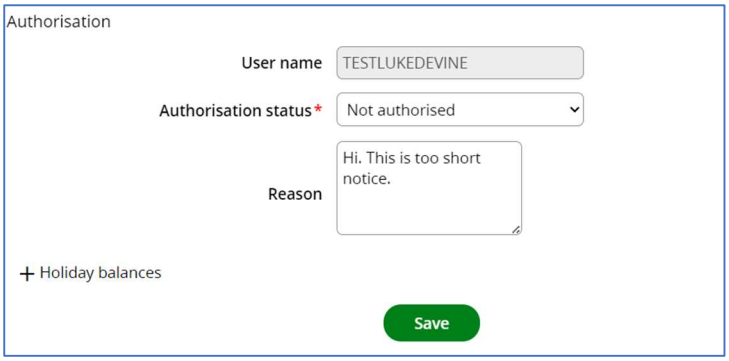
Once saved, the employee will receive an email to acknowledge their request:

And the line manager will receive an email to alert them to the request:

The manage can authorise the request from the email itself by select **Authorise**. Or they may wish review the form first and then authorise.

If approved, the leave is recorded in iTrent and the balances are updated. The employee will receive the following email as confirmation of leave approval:

If the request is rejected, the leave entitlement is not adjusted, however a record of the unapproved leave request will remain in iTrent. The line manager can provide a note for the employee in the **Reason** field on the form.

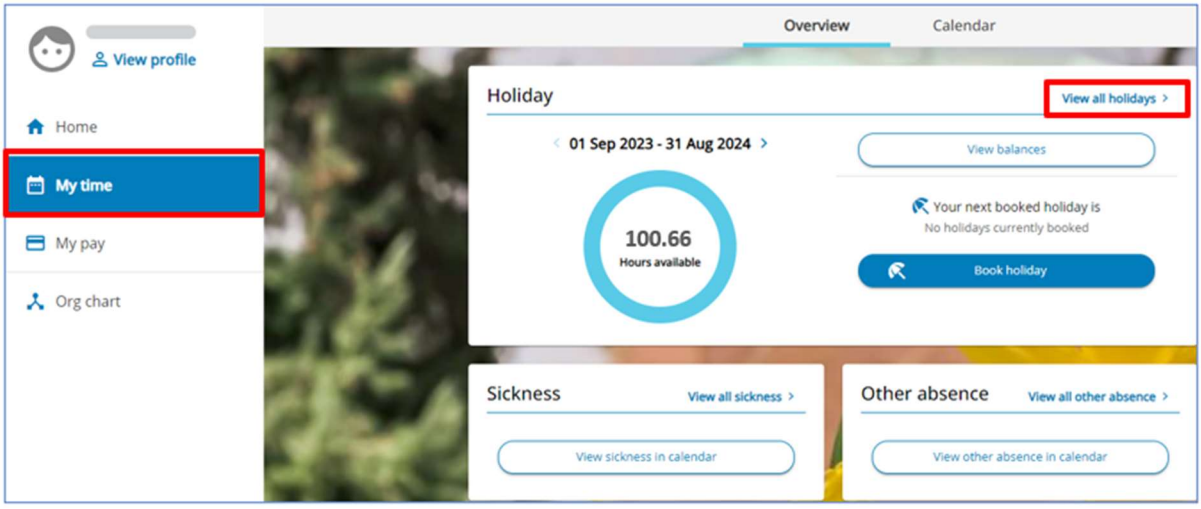


The employee will receive the following notification, which contains any notes from the line manager:

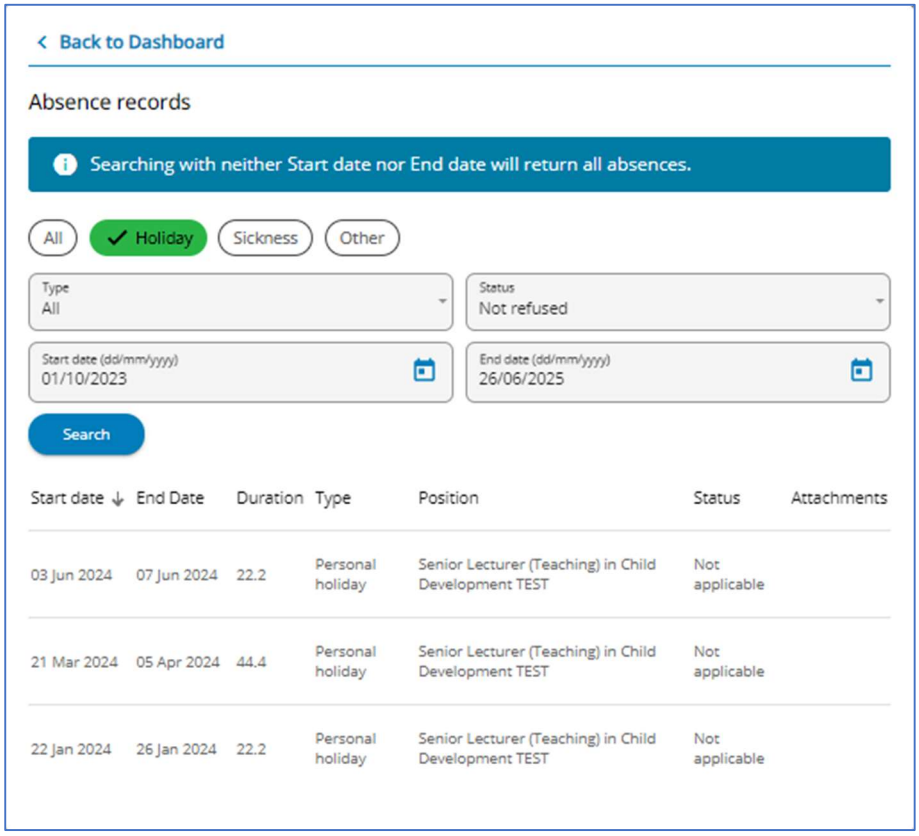
If the manager, HR Administrator, or a Team Administrator enters an absence directly into iTrent, the employee will receive this email notification:

View holidays and other absences

To view holiday bookings, the employee can select **view all holidays** from this tile on the home page of My View.



All holiday dates are listed here:



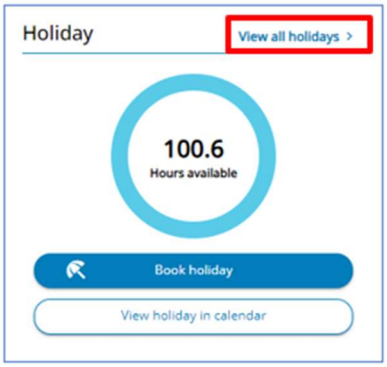
Note that the employee can select **View all sickness** and **View all other absence** from here also.

All leave and absences can be viewed via the calendar view, which is selected the *view in calendar* buttons.

Amending an existing request

Employees can request an amendment to a leave request only if the dates are in the future. If the dates have already passed, then the manager or Team Administrator must make the amendment directly into iTrent.

To request an amendment, the employee can select a leave period via the Home screen on My View, and select **view all holidays** from this tile on the home page of My View.



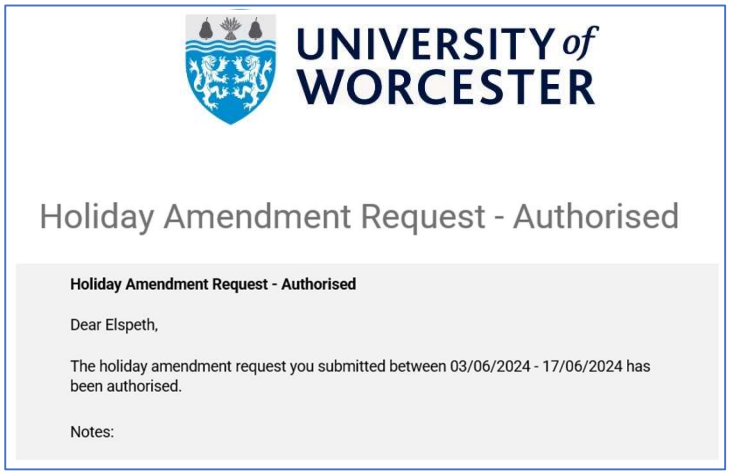
When the leave period is selected, the employee can make the required changes directly into the leave form and select **Save**.

Once saved, the employee will receive an email to acknowledge their amendment request:

And the line manager will receive an email to alert them to the amendment request:

The manager can authorise the request from the email itself by select **Authorise**. Or they may wish review the form first and then authorise.

If approved, the leave record and leave balance are update in iTrent. The employee will receive the following email as confirmation of leave adjustment approval:



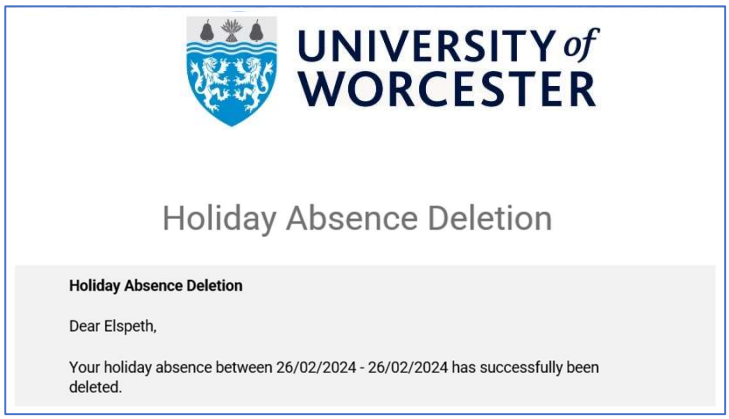
If the request is rejected, the leave record and leave entitlement are not adjusted. The manager can provide a note for the employee in the **Reason** field on the form before rejecting. The employee will receive the following email notification to advise that the request was rejected and contains any notes from the line manager:

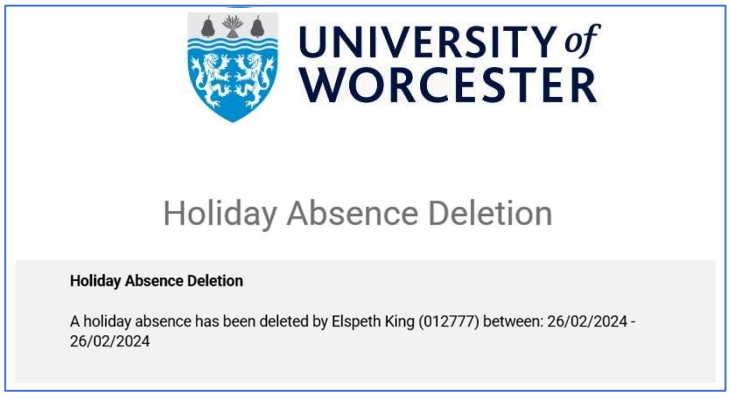
Withdrawing a period of leave

Employees can withdraw a period of leave only if the dates are in the future. If the dates have already passed, then the manager or Team Administrator must remove the leave period directly from iTrent.

If an employee withdraws leave, they can delete it via My View.

This does not workflow, but the employee and manager will receive an email to confirm the deletion:





Bank Holidays

In iTrent, Bank Holidays are included in the total leave entitlement. These are allocated in hours, so are converted using the following calculation:

Full time daily hours = 37 hours ÷ 5 days

Full time daily hours = 7.4

Number of Bank Holidays = 8

8 x 7.4 = 59.2

Employees who work full time will have **59.2** hours added to their holiday entitlement.

If an employee works part time (and we will use 22.5 hours as an example), their Bank Holiday entitlement is calculated as follows:

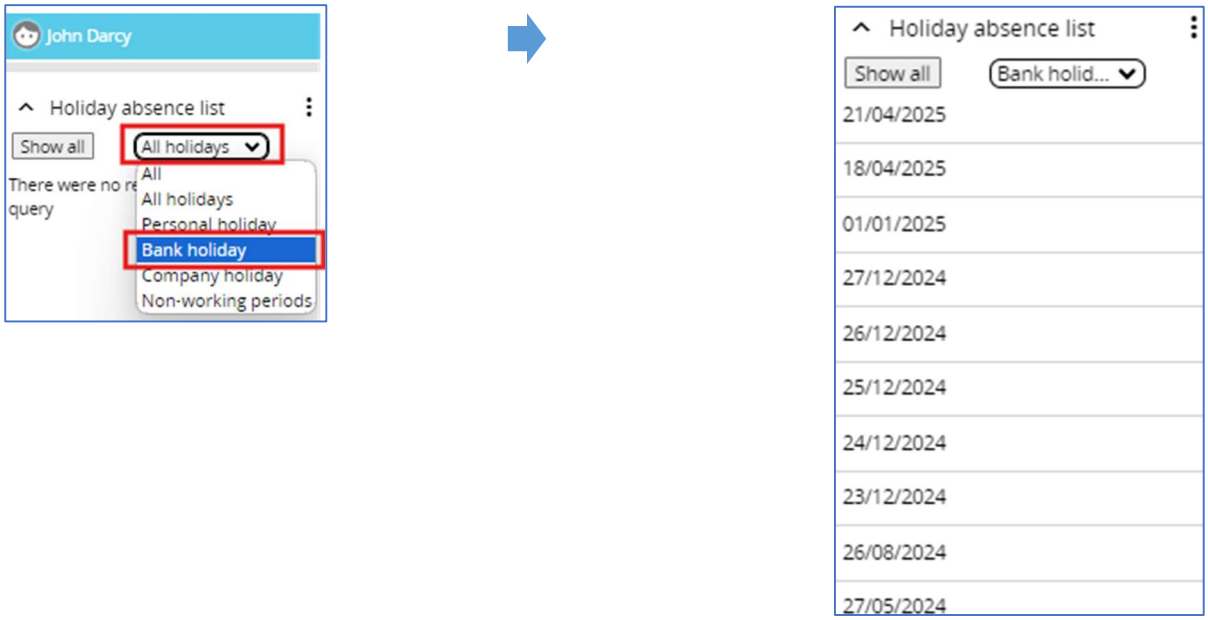
(59.2 ÷ 37) x 22.5 = 36 hours

Bank Holidays are pre-booked for all employees. If a Bank Holiday falls on a day an employee normally works according to their working pattern, the number of hours for that day are deducted from their leave balance.

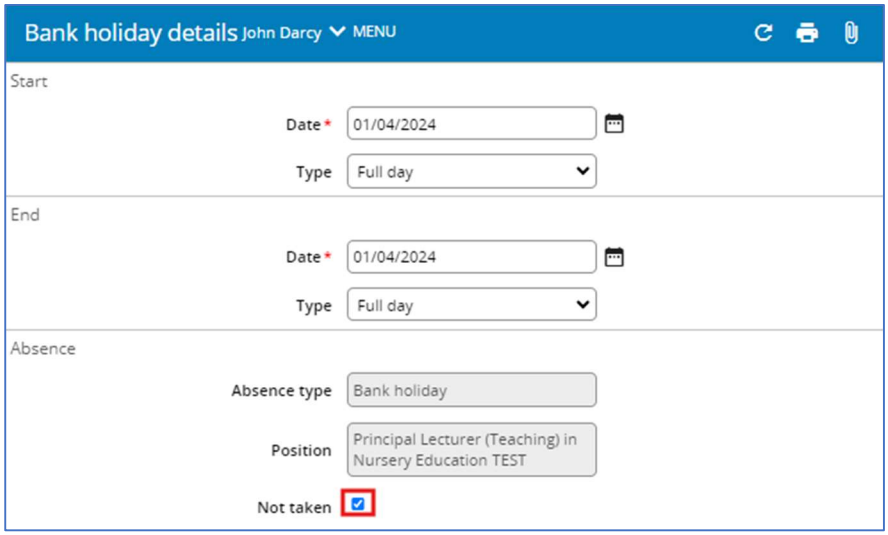
Crediting Bank Holidays

In rare circumstances where a colleague works on a Bank Holiday, this day can be credited, and the hours added back to their holiday balance.

From the page **Holiday Absence details**, change the filter on the left-hand menu to *Bank Holidays* as shown below.



This will display all the Bank Holiday dates. Select the date to be credited, and check the box ***Not taken*** *and then* **Save*.***



Closure days

The University will normally close for 3 days during the Christmas period (in addition to Christmas Day and Boxing Day), and these are included in the holiday entitlement for all employees. These three days are pre-booked in iTrent for all employees so there is no requirement to book these days.

The allocation of the three days is reduced pro-rata for part time colleagues. In the same way as Bank Holidays, if a closure day falls on a day an employee normally works according to their working pattern, the number of hours for that day are deducted from their leave balance.

Other absence

There are some instances where line managers and holders of the Team Administrator role can input other absences directly into iTrent. HR Administrators can input all types of other absence using this navigation.

Other absences have been grouped into three types:

- Other Paid
- Other Unpaid
- Research Leave

Against each absence type, an absence reason is recorded. These absence reasons are:

Other Paid Leave:

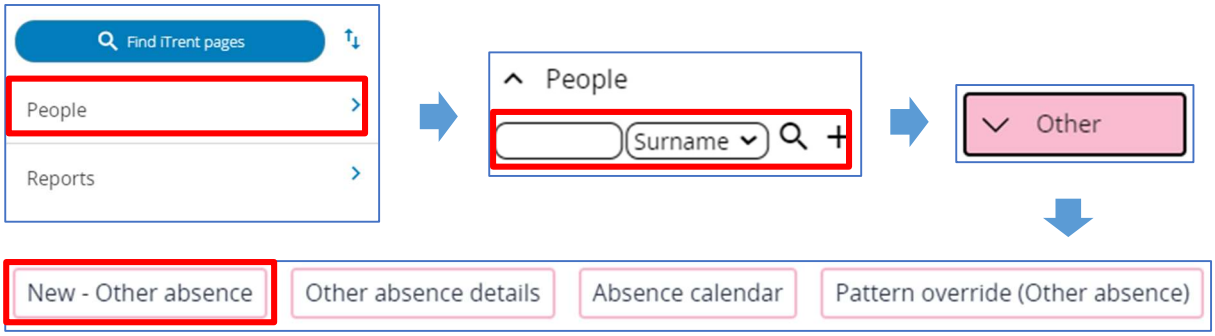
Antenatal Care
Compassionate Leave
Emergency Parental Leave
Medical Appointment
Study / Exam Leave

Other Unpaid Leave:

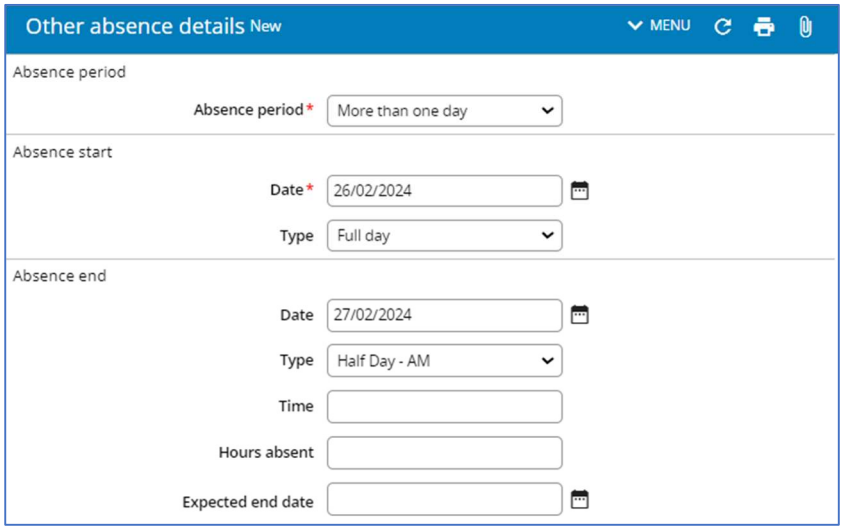
Authorised Unpaid Leave
Compassionate Leave
Emergency Parental Leave
Medical Appointment
Study / Exam Leave

Note that **Research Leave** has only one absence reason of the same name.

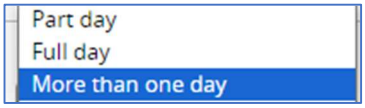
To enter other absences, from the menu on the home screen, select *People > [select employee] > Other > New – Other absence*:

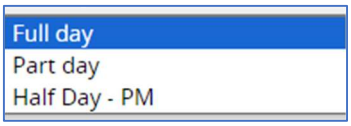


The **Other absence details** page will display.

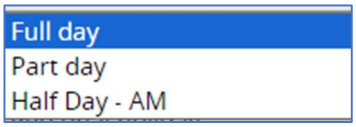


The **Absence period** provides 3 options, and the page will update depending on the selection made.

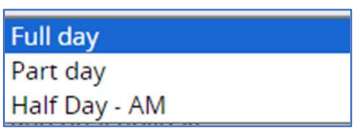




If you have selected *More than one day* or *Part day*, you will need to provide the **Absence start type**. Select either *Full day* or *Half Day – PM.* Half day is calculated from the working pattern.



If you have selected *More than one*, you will need to provide the **Absence end type**. Select either *Full day* or *Half Day – AM*. Half day is calculated from the working pattern.



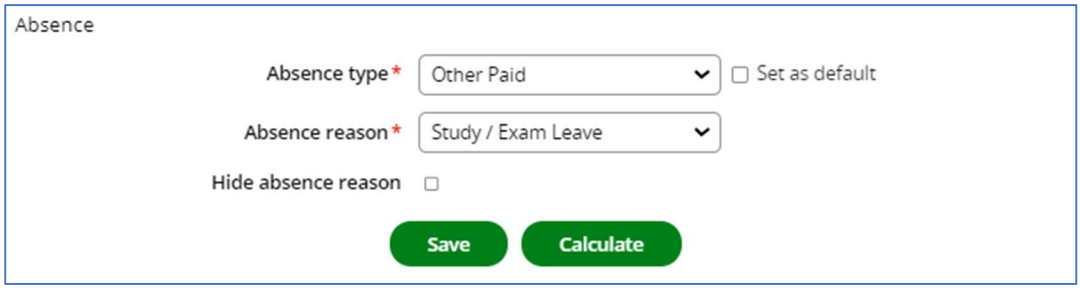
If you have selected *Part day*, you will need to completed the the fields **Holiday start time**, **Holiday end time** and **Hours absent** (which will override the working pattern hours).

This part of the page records the **Absence type**. The highlighted field is a pick-list with these options.

Absence
Absence type *
Other Paid
Set as default
Absence reason *
Study / Exam Leave
Hide absence reason
Save
Calculate
Other Paid
Other Unpaid
Research Leave

Paid leave

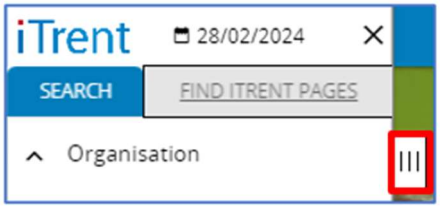
If *Other Paid* is selected as an **Absence type**, there is no payroll action and iTrent will only record the absence. Select the **Absence reason** from the drop-down list. In this example we have selected *Study/Exam Leave*.



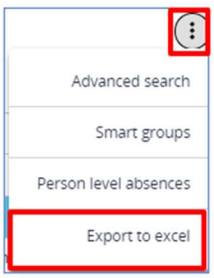
When completed, select **Save**. This will record the absence in iTrent. You can calculate the absence to immediately see the days/hours lost, however an absence calculation will run periodically in iTrent.

Once you have saved the record, the absence appears in a list on the left-hand side bar along with other absence dates recorded in iTrent.

You can expand the left-hand bar using this tab:



Once expanded, you can view more information about the absence recorded for the employee including *Working days/hours lost.* If your record shows '0' hours, this will update once the absence calculation has occurred.

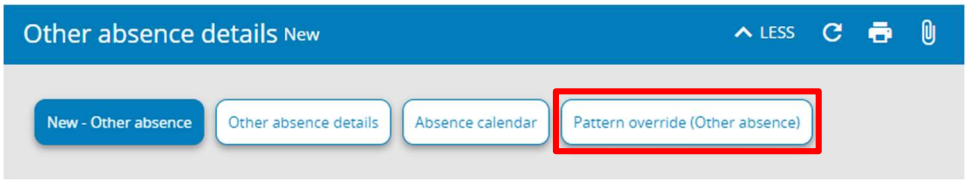


This list can be used as an 'other absence' report for the employee and can be exported to Excel. Select the 3 dots as shown below and select *Export to excel*.

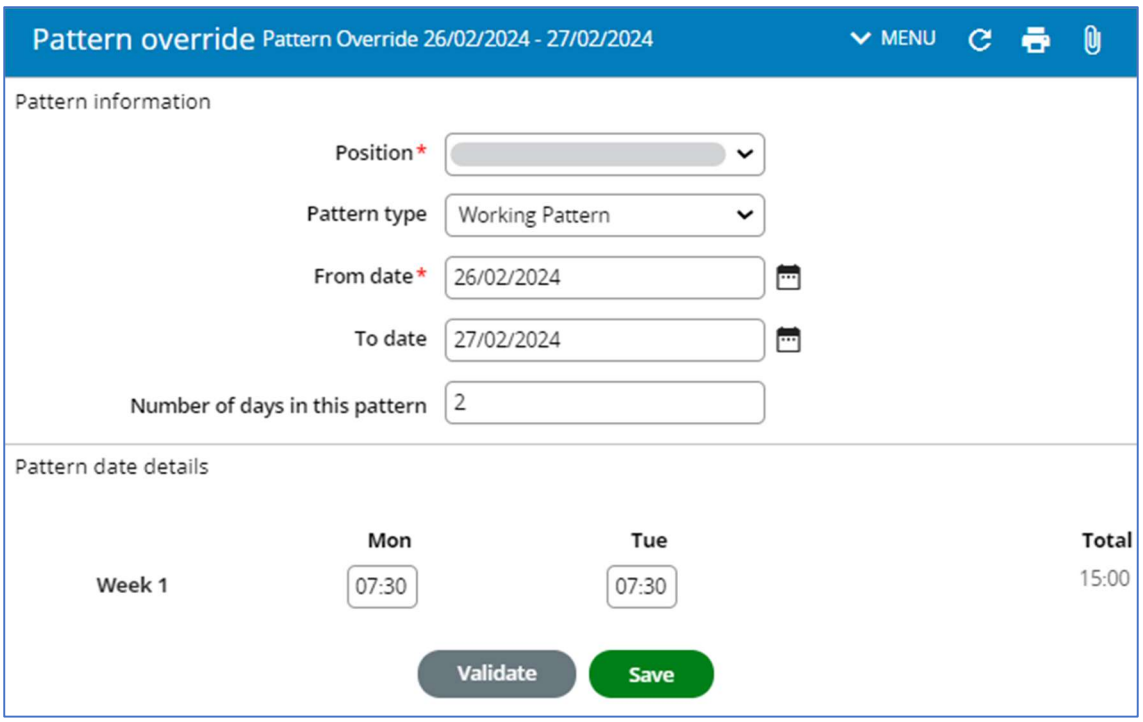
Pattern override

iTrent calculates time lost based on the employee's working pattern. If the employee was due to work on the day/days absent according the work pattern, they will be counted as absent days. In rare circumstances, and usually only if the employee works a flexible work pattern or fractional days, the work pattern may need to be amended to record the correct number of days lost. This is known as 'pattern override'.

To check the work pattern, expand the menu and select *Pattern override (Other absence)*, ensuring that the relevant absence is selected from the left-hand bar.



This will display the **Pattern override** page. Check and update the work pattern to correctly reflect the hours that would normally have been worked on each day. Select **Validate** to check the amended total hours, and **Save** when you are done.

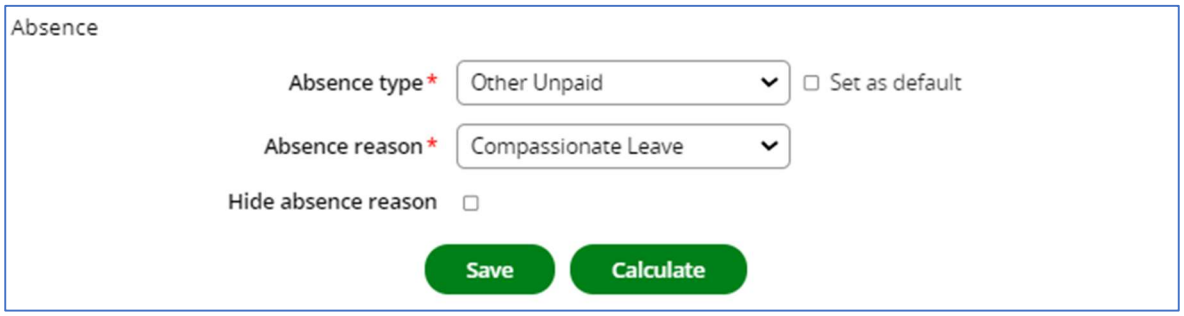


This action only amends the work pattern within the period of absence and ensures that the number of hours to be deducted from the leave balance is accurate. The employee's work pattern on either end of the absence stays the same.

Unpaid leave

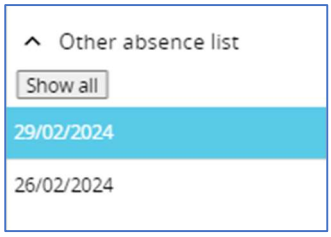
If *Other Unpaid* is selected as an **Absence type**, iTrent will record the absence and make an adjustment to pay. No manual intervention is required for this, therefore no notification to payroll is required.

Select the **Absence reason** from the drop-down list. In this example we have selected *Compassionate Leave*.

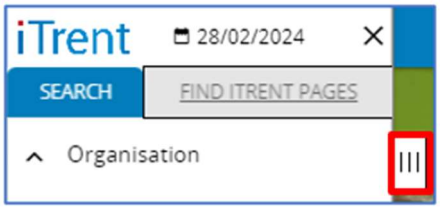


When completed, select **Save**. This will record the absence in iTrent. You can calculate the absence to immediately see the days/hours lost, however an absence calculation will run periodically in iTrent.

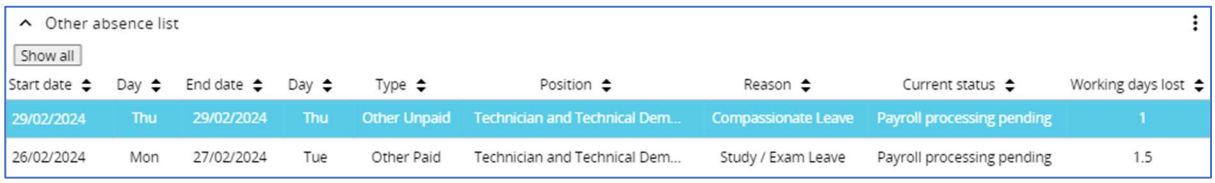
Once you have saved the record, the absence appears in a list on the left-hand side bar along with other absence dates recorded in iTrent.



You can expand the left-hand bar using this tab:



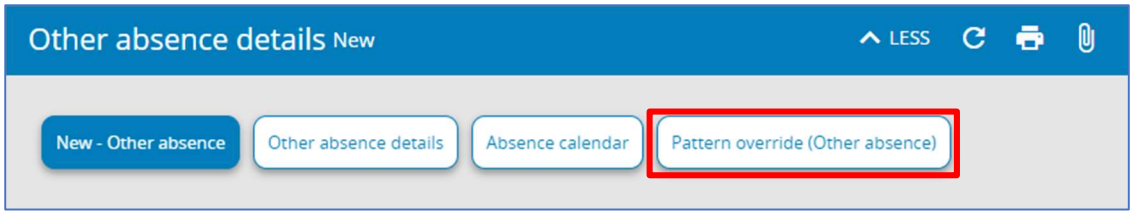
Once expanded, you can view more information about the absence recorded for the employee including *Working days/hours lost.* If your record shows '0' hours, this will update once the absence calculation has occurred.



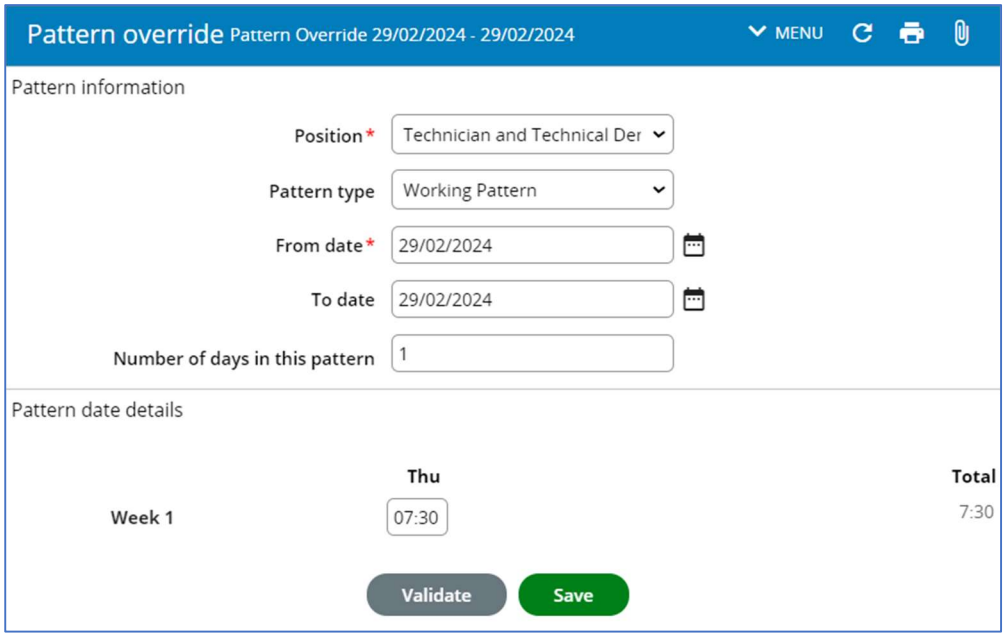
Pattern override

iTrent calculates time lost based on the employee's working pattern. If the employee was due to work on the day/days absent according the work pattern, they will be counted as absent days. In rare circumstances, and usually only if the employee works a flexible work pattern or fractional days, the work pattern may need to be amended to record the correct number of days lost. This is known as 'pattern override'.

To check the work pattern, expand the menu and select *Pattern override (Other absence)*, ensuring that the relevant absence is selected from the left-hand bar.



This will display the **Pattern override** page. Check and update the work pattern to correctly reflect the hours that would normally have been worked on each day. Select **Validate** to check the amended total hours, and **Save** when you are done.



This action only amends the work pattern within the period of absence and ensures that the number of hours to be deducted from the leave balance is accurate. The employee's work pattern on either end of the absence stays the same.

Research Leave

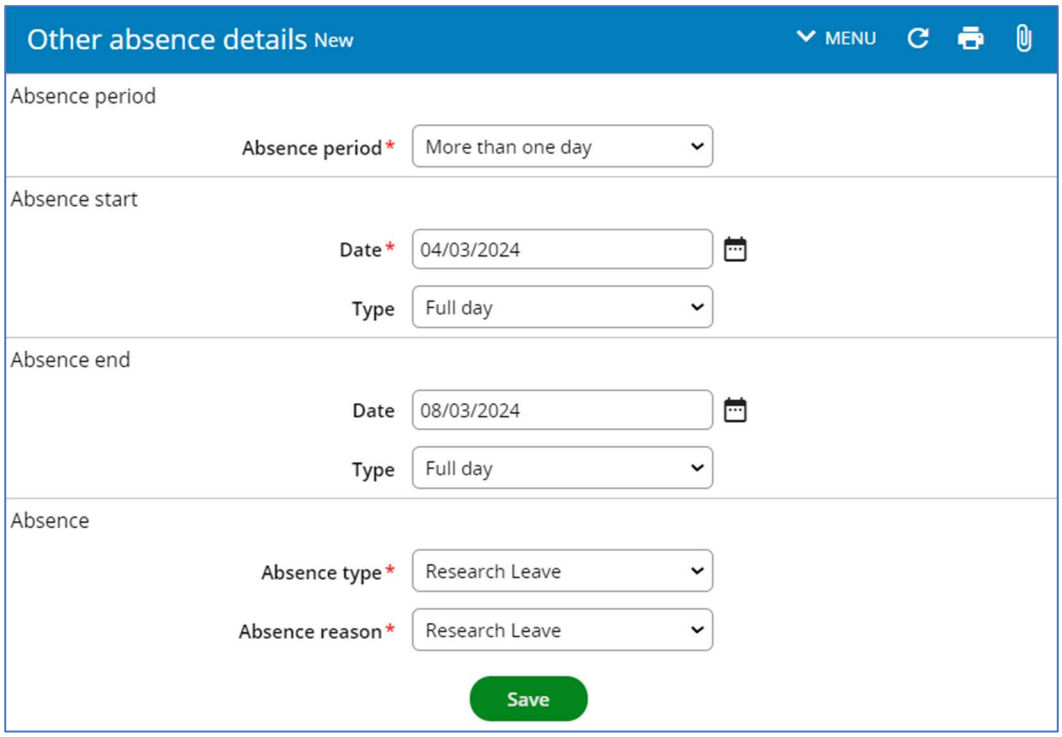
This type of leave is only available to Academic colleagues who job title contains 'Lecturer', 'Senior Lecturer' or 'Principal Lecturer', but does not contain 'Teaching'.

Eligible employees can take 20 days Research Leave per academic year. This is reduced pro-rata for part-time colleagues.

Research Leave cannot be carried forward from one year to the next.

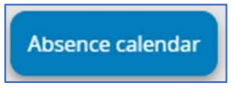
To record this type of leave, select *Research Leave*, as an **Absence type**.

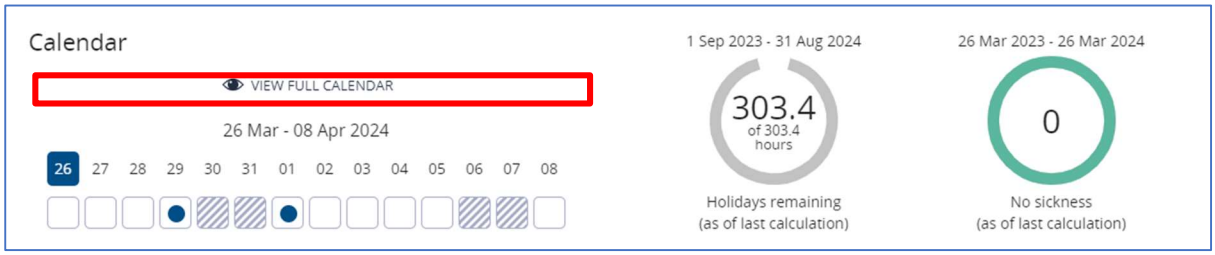
Select *Research Leave as* the **Absence reason** from the drop-down list as shown in the example below. When completed, select **Save**.



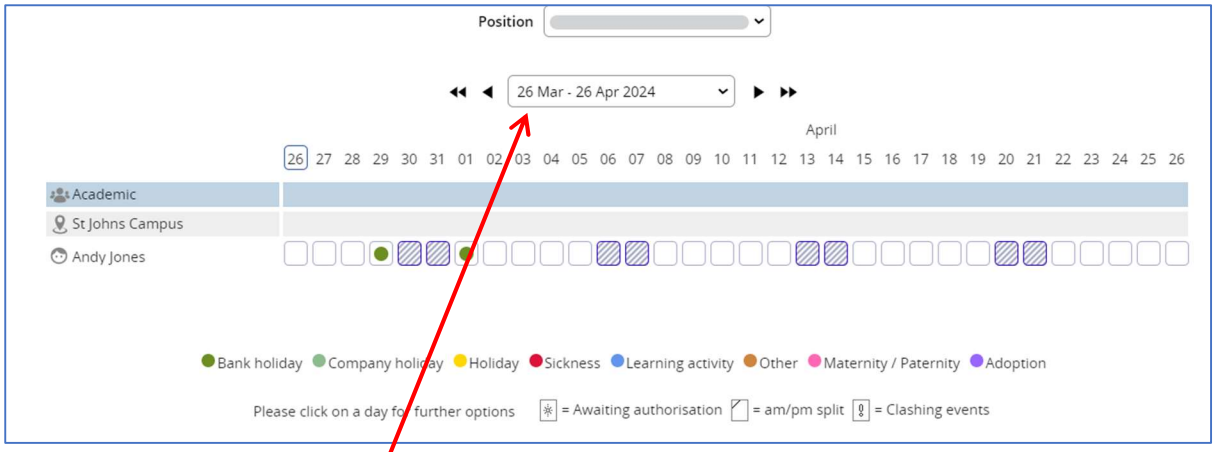
Absence Calendar

All absences can be viewed on the absence calendar. The absence calendar can be accessed the **Absence Calendar** link, which appears on all the absence sections available to you or from the person's home screen.

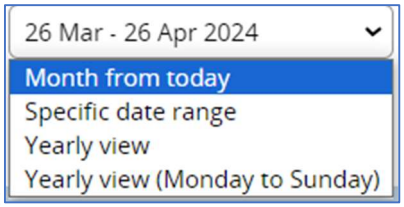




When selected, the calendar expands.



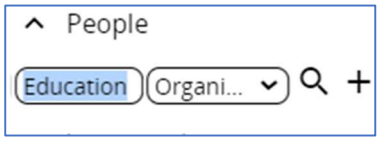
The view can be amended from the date range, which will display the following options:



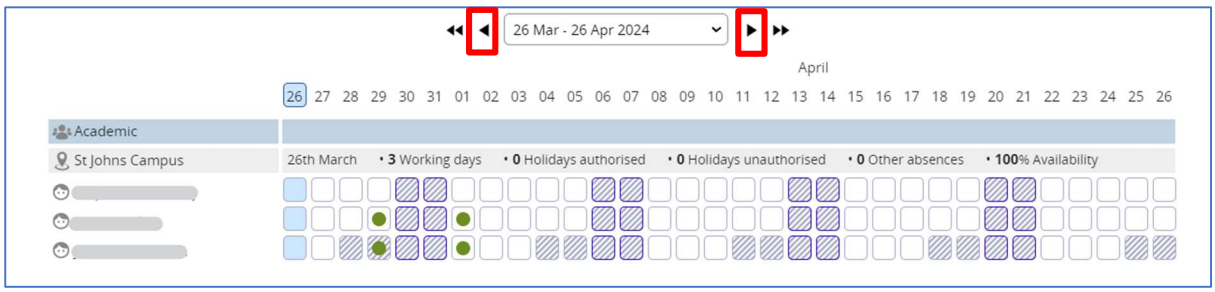
:

Try amending this to a yearly view.

You can extend the calendar to view more employees in your team. Use your search facility to find all employees in your team. In this example, we have searched for 'Education' and the criteria is 'Organisation Unit'.



Whilst the calendar is displayed in *Month from today* view, hold down the CTRL key and select a few employees. The calendar will display as follows:



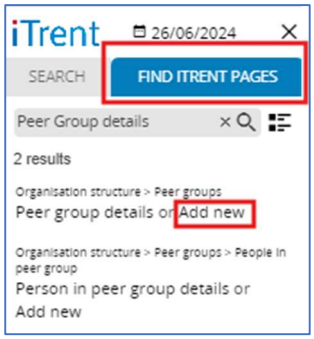
You can move forward or backward by one month by using the arrow keys highlighted. This is useful when approving annual leave to see the absence view for your team.

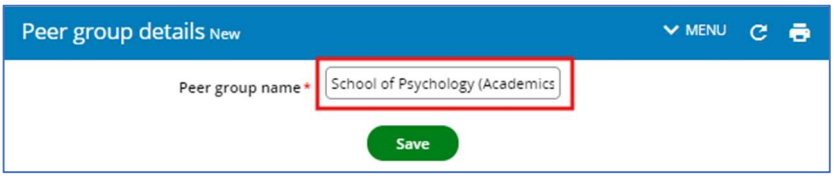
Peer Groups (viewing Team's absences on a calendar in MyView)

The calendar in My View defaults to the employee's own calendar. However, it is possible to view the leave and absence information of a team. Only the leave type (holiday, sickness, other) is displayed. The reasons behind the absence type are not displayed.

A team is defined using the **Peer Group** functionality, and is highly flexible, which also means that it is manually maintained (much the same as a distribution list in Outlook). This is a two-step process.

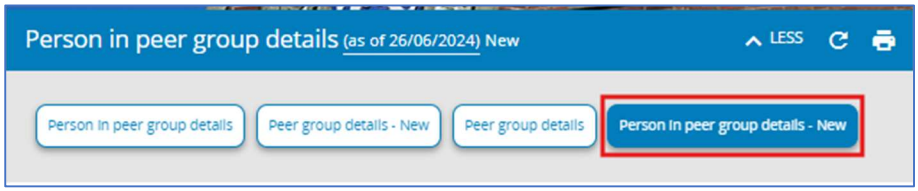
Using ***Find iTrent Pages***, search for and select **Peer group details (add new)**.



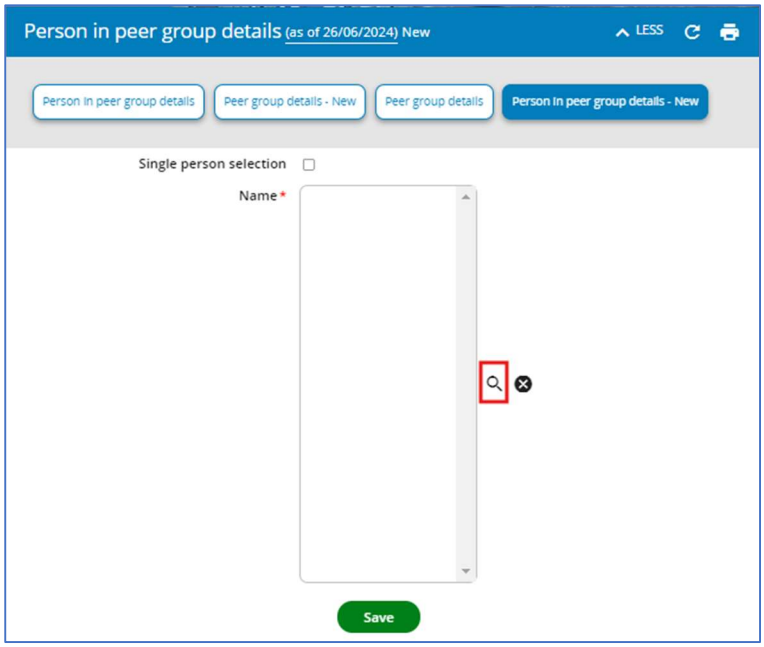


Give your Peer Group a recognisable name.

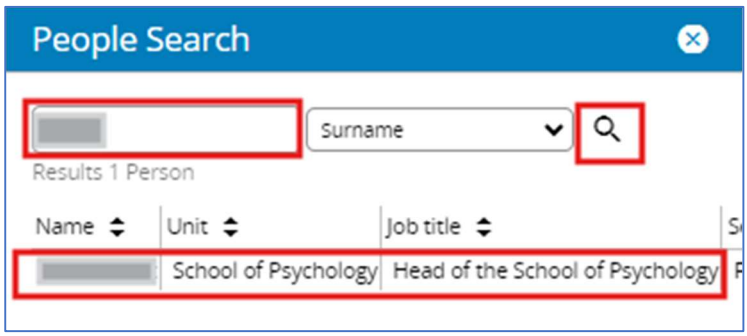
Next, expand the menu at the top of this page and select **Person in peer group details - add new**.



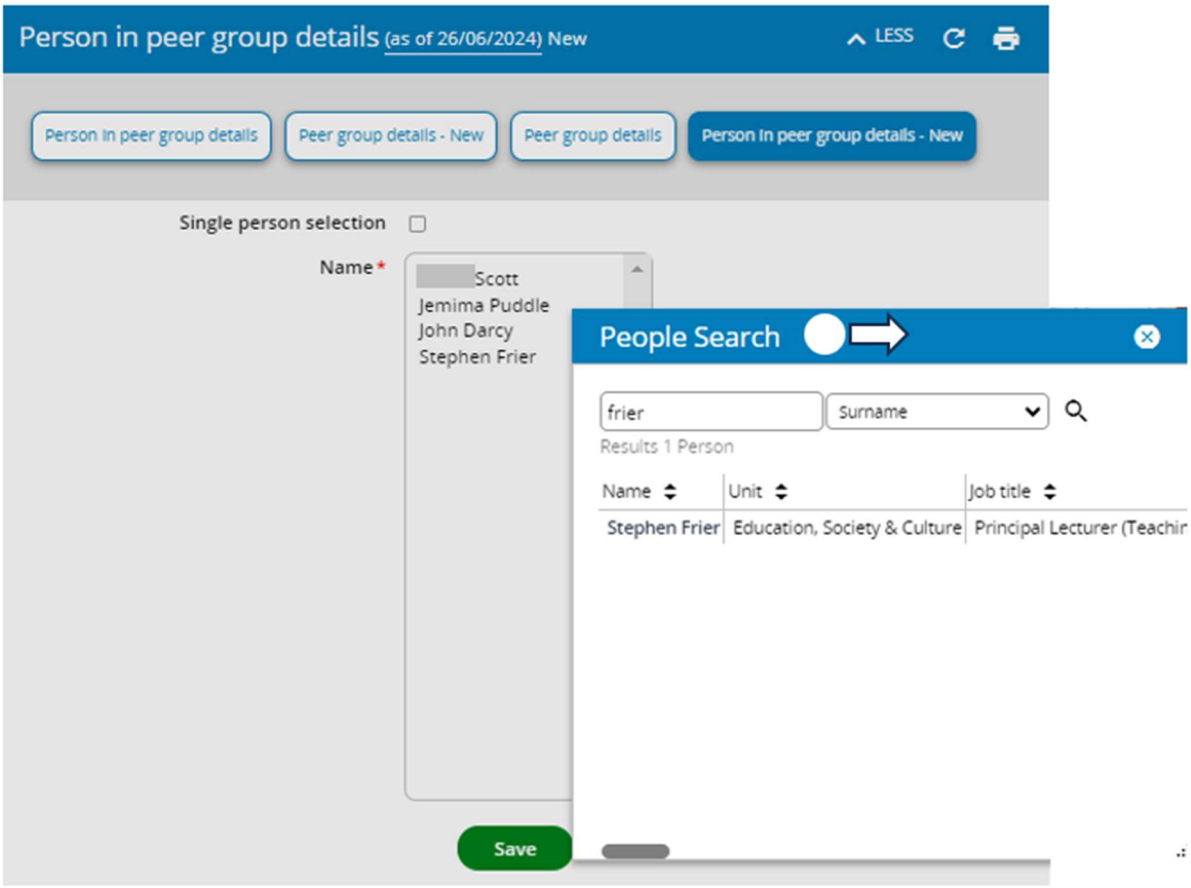
This will open a page where you can search for and list the people to be included in this group. Select the search icon as demonstrated below.



Search for the person and select their record. You only need to click once on the record, and it will appear in the list. The search box remains open so that you can quickly search for another person.

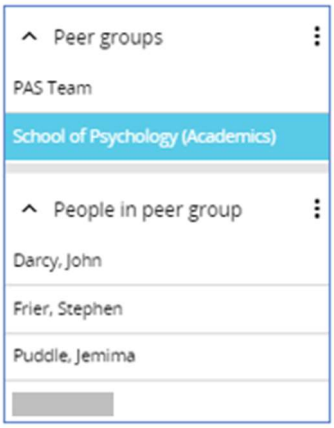


A useful trick is to select and hold the blue bar at the top and move the window to the side so that you can see people being added to your group.

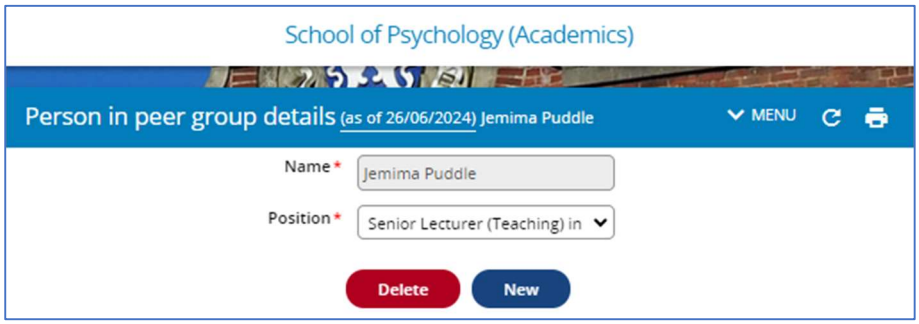


When done, close the search page and select **Save**.

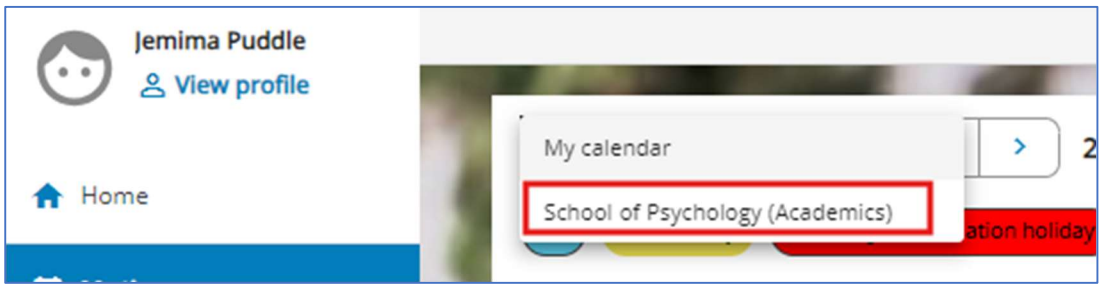
This of people will now appear in the left-hand menu.

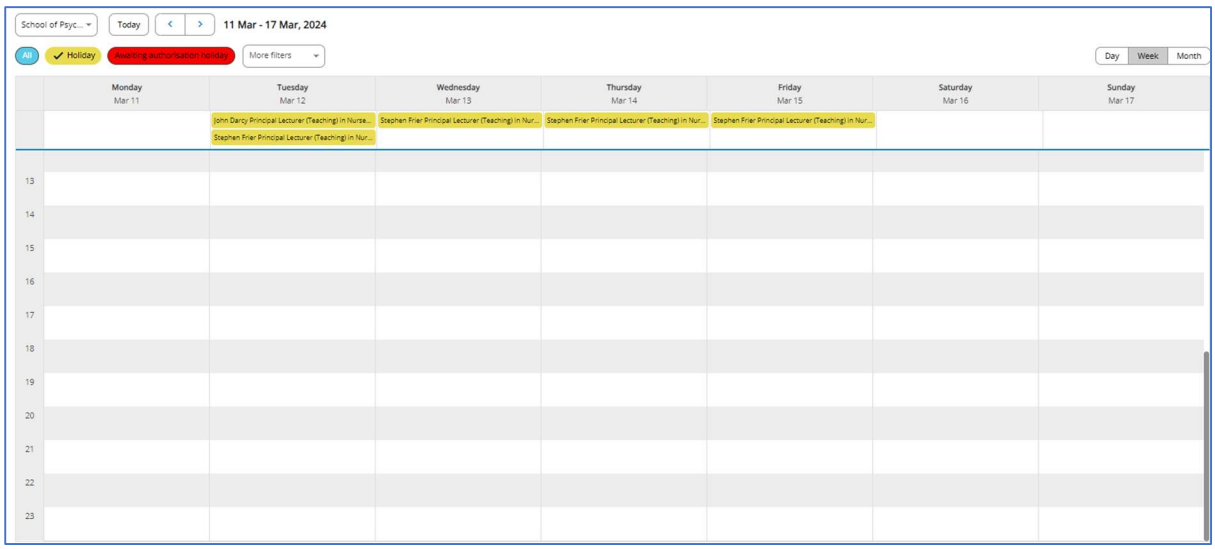


You can select a person's record to remove them if needed, or you can select a person and select **New** to add more people.



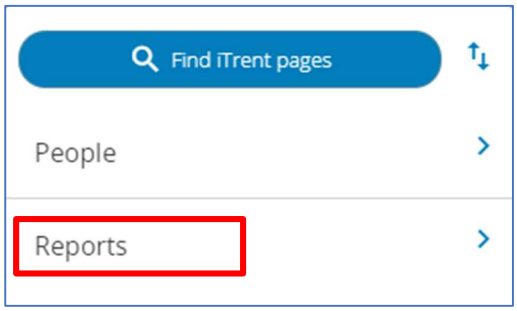
Everyone in the group will now be able to view this group in their calendar as shown below (in this example, we are viewing the calendar of Jemima Puddle who is a fictitious employee).





Section 3 – iTrent Reports

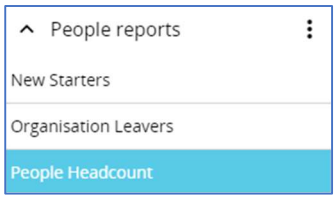
A variety of reports come as standard with iTrent. These can be accessed from the main menu by selecting **Reports**:



A new set of categories are displayed, which group the reports into the following groups. To view a report, select the category, and then select *Run Report.*

People reports

In the example below, we have selected **People Reports**. We then select **Run report**.



The available reports are displayed in the left-hand bar. Select the desired report and select *Run Report* once again.

In this example, we have selected the *People Headcount* report.

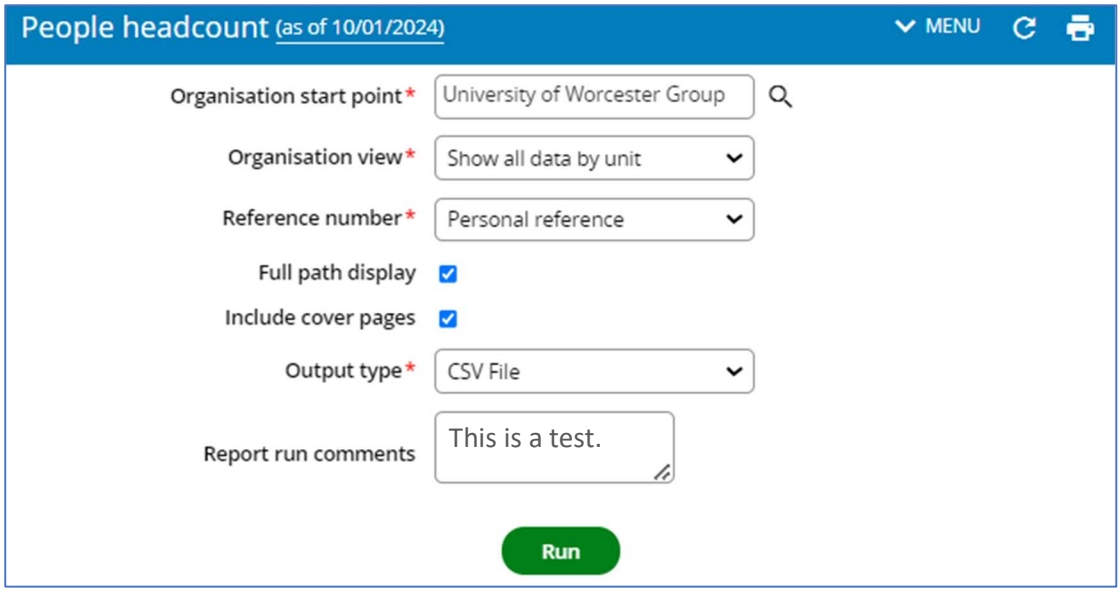
This report is date effective, so provide a date in the date selection box and select **OK**.

In this next screen, you can refine your report as follows:

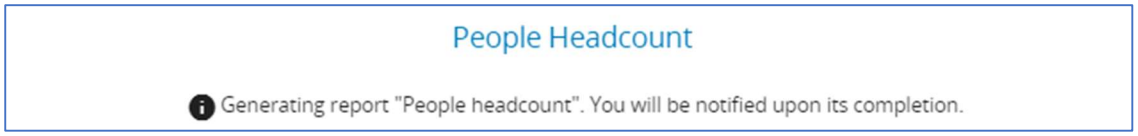
Organisation starting point: Select the unit (department) in the structure you wish to report from. By leaving 'University of Worcester Group' at the top, you will be able to report on the whole workforce.

Organisation view:	Decide if you wish to report on the selected unit alone, or all units below the point selected.
Reference Number:	Leave this defaulted as 'Personal reference'
Full path display:	Leave this ticked as default.
Include cover pages:	Decide if you wish to include a cover page which summarises the design of the report.
Output type:	Select how you wish to view the report; the options are pdf document, or an Excel (csv) file.
Report comments:	You can add a comment to your report, which will be displayed when you view your report in a list of downloads later.

In this example, we are reporting on the whole University, and we have defined that we wish to view all data by unit in a CSV file. When ready, select **Run**.



You will see a message in the top bar of this screen notifying you that your report is being processed.

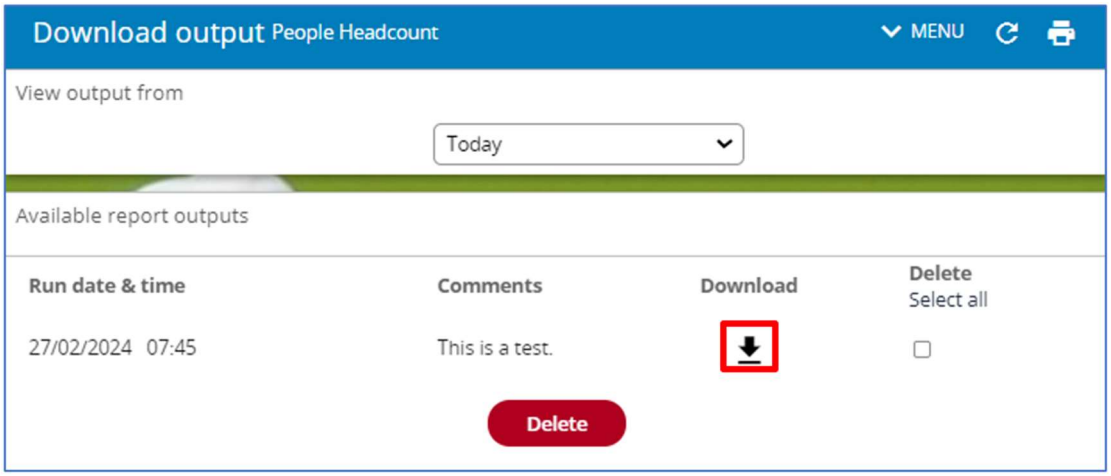


Wait until you see a bell symbol in the top blue bar, which will display when the report is ready.

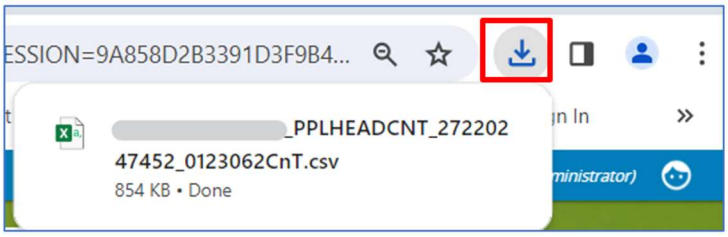
When the symbol appears, select *Menu* from the top of the screen:

This will display an option to *Download output.* Select this option.

Your report is now available to download. You can see the comment that was placed against this report here.



To download, select the download icon. You can then retrieve this document from the download list from the top right-hand corner of your screen as follows:



Or you can find it in the Downloads folder of your pc/laptop.

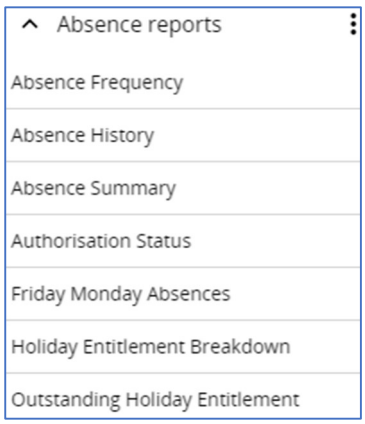
It is good practice to return to the list of reports and delete them when they are no longer required (both in iTrent and your downloads folder).

You can also retrieve reports from your To Do list which is in your Home Screen.

Select this link, and then select the tab called *Processes* from the top. You can see the report that you have just run in the list. This is useful to know if you do not wish to wait for the report to run (as show above) and wish to return to it later.

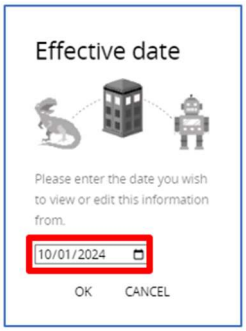
Absence reports

In this next example, we will select **Absence Reports**, then select **Run report**.



The available reports are displayed in the left-hand bar. Select the desired report and select *Run Report* once again.

In this example, we have selected the *Absence History* report.



This report is date effective, so provide a date in the date selection box and select **OK**.

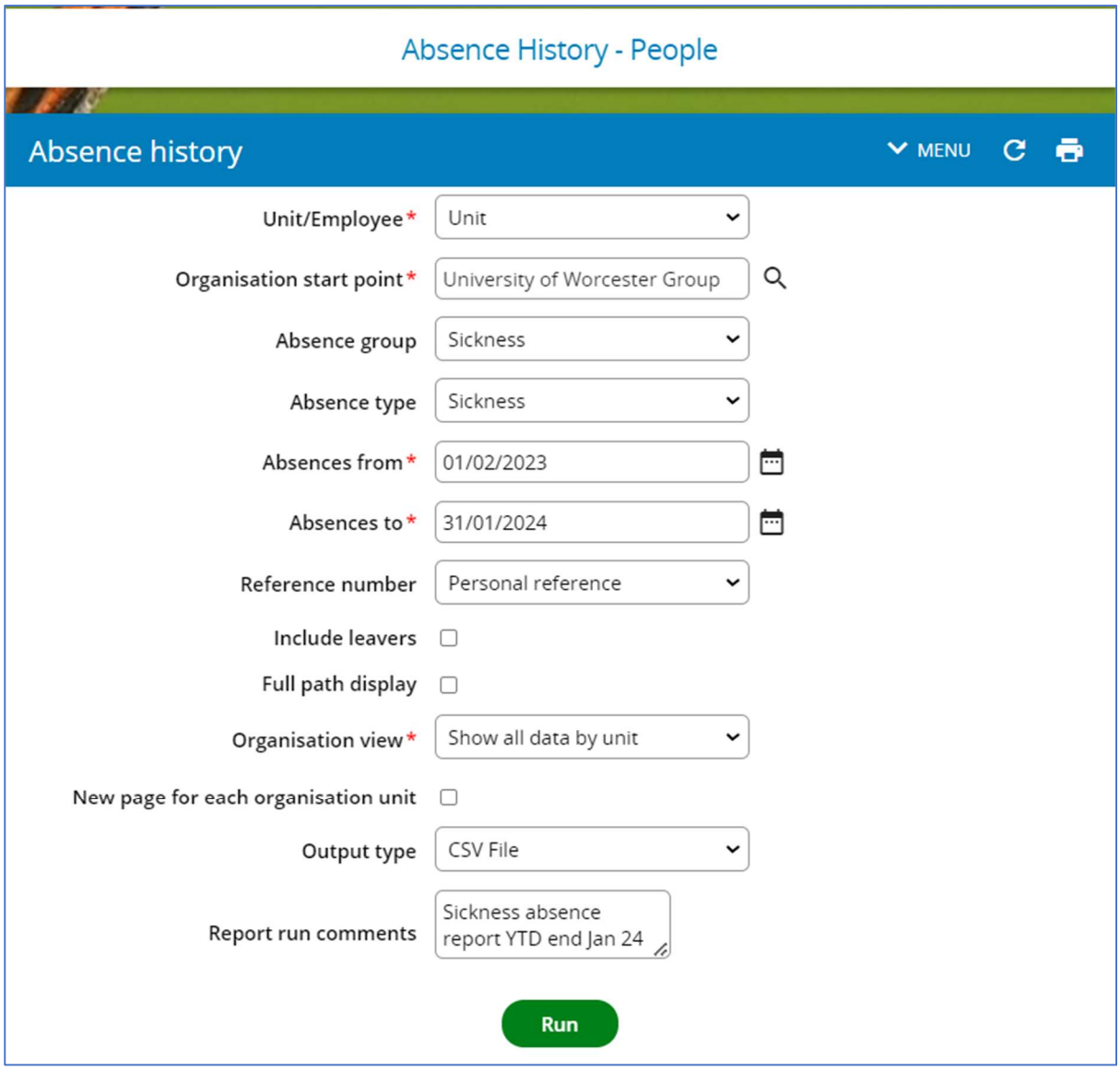
In this next screen, you can refine your report as follows:

Unit/Employee	Select whether you wish to report on whole department/s or one individual employee.
Organisation starting point:	Select the unit (department) in the structure you wish to report from. By leaving 'University of Worcester Group' at the top, you will be able to report on the whole workforce.
Absence group:	Decide if you wish to report on all absences or one particular absence group.
Absence from and to	This is the date range that you wish to report for. Select a start date and end date.
Reference Number:	Leave this defaulted as 'Personal reference'
Full path display:	Leave this ticked as default.

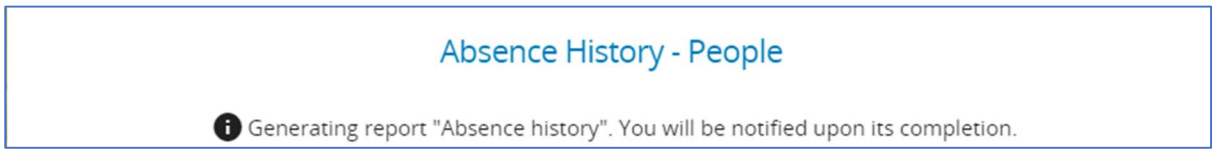
Output type: Select how you wish to view the report; the options are pdf document, or an Excel (csv) file.

Report comments: You can add a comment to your report, which will be displayed when you view your report in a list of downloads later.

In this example, we are reporting on the whole University, and we have defined that we wish to view all data by unit in a CSV file. When ready, select **Run**.



You will see a message in the top bar of this screen notifying you that your report is being processed.

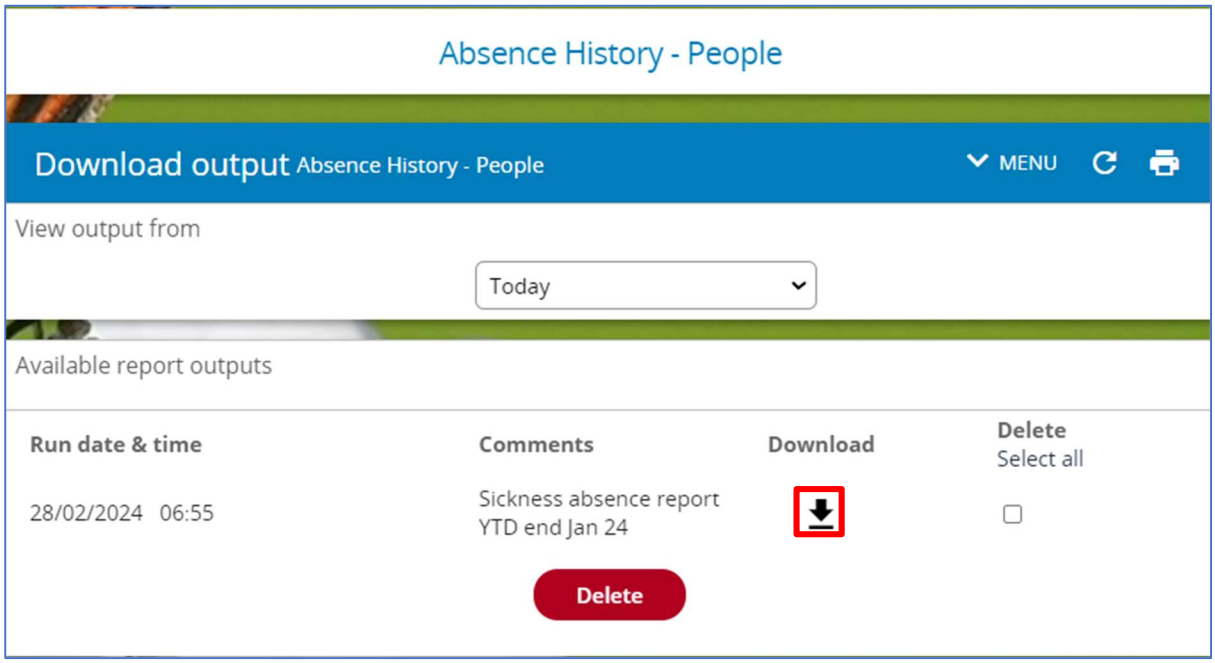


Wait until you see a bell symbol in the top blue bar, which will display when the report is ready.

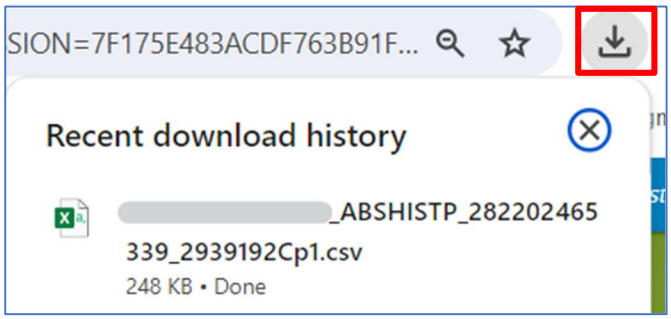
When the symbol appears, select *Menu* from the top of the screen:

This will display an option to *Download output.* Select this option.

Your report is now available to download. You can see the comment that was placed against this report here.



To download, select the download icon. You can then retrieve this document from the download list from the top right-hand corner of your screen as follows:



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It is good practice to return to the list of reports and delete them when they are no longer required (both in iTrent and your downloads folder).

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