Manager Self Service Guidance – Leave Module

This document provides guidance on using the Leave module within Manager Self Service on iTrent. It covers:

- Checking work pattern (slides 3-4)
- Annual (slides 5 - 10)
- Special (slides 11 - 14)
- Flexi (slides 15 - 20)
- Leave Reporting (slides 21 - 27)

Version	Notes	Author	Date
1.0		iTrent Payroll Systems Officer	12.01.24
1.1	Update to special leave slide Refresh after amendments	Project Manager (HRP)	02.04.24

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Annual Leave

- Annual leave balances will now show in hours, a conversion tool is available to assist with understanding conversion between days and hours
- Leave can be requested in full days, half days or as hour increments (subject to manager discretion dependent on the operational needs)
- If concerned that an employee's annual leave balance is not correct, first check that the correct work pattern is recorded for the employee
- Instructions on how to do this are available in the following slides. If your employee's work pattern is incorrect, please use the contract change form to update it.

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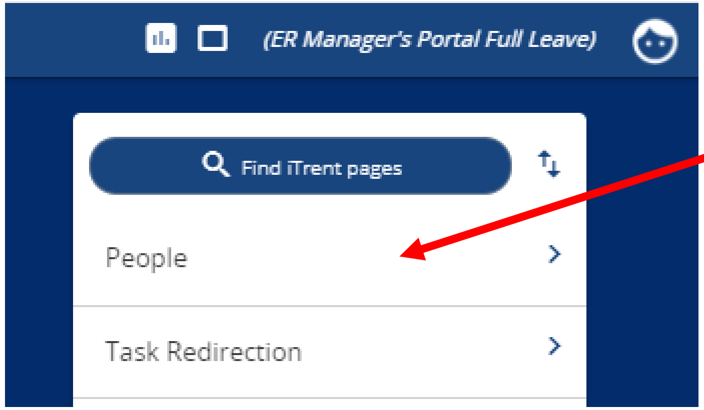
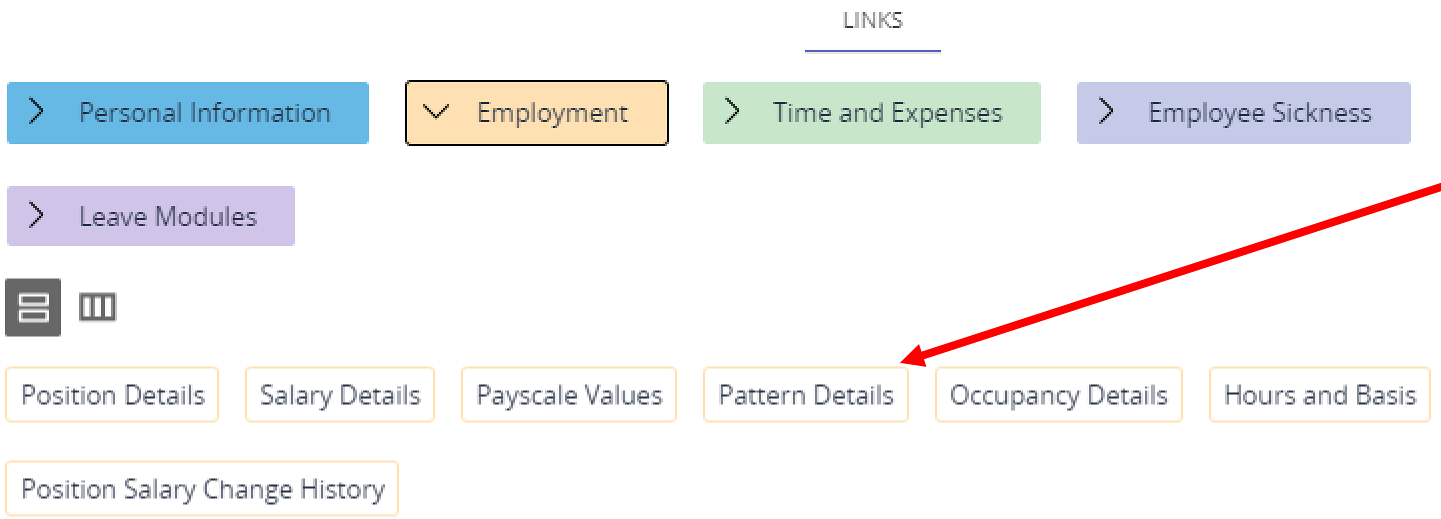
Checking Work Pattern Information

On Manager Self Service home page click People



Select relevant Employee on the left-hand pane and click on employment link and select Pattern Details



Checking Work Pattern Information

On selecting Working Pattern from the left-hand pane, the pattern details will then be shown

Pattern details Working Pattern

MENU

Pattern information

Level* Systems Officer

Type* Working Pattern

Pattern* C003 (28.67) - M7.17 T7.17 W7.17 Th7.17 F0.00 S0.00 Su0.00

Start day* Week 1 / Day 1

Start date* 01/01/2024

End date

Hours information

Contractual hours 28.67

Pattern days

Current day Week 1 / Day 5

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	07:10	07:10	07:10	07:10	00:00	00:00	00:00	28:40

This shows the total hours recorded for each workday of your employee's pattern. *N.B. Minutes are shown in decimal format, e.g. 0.17 = 10 minutes.*

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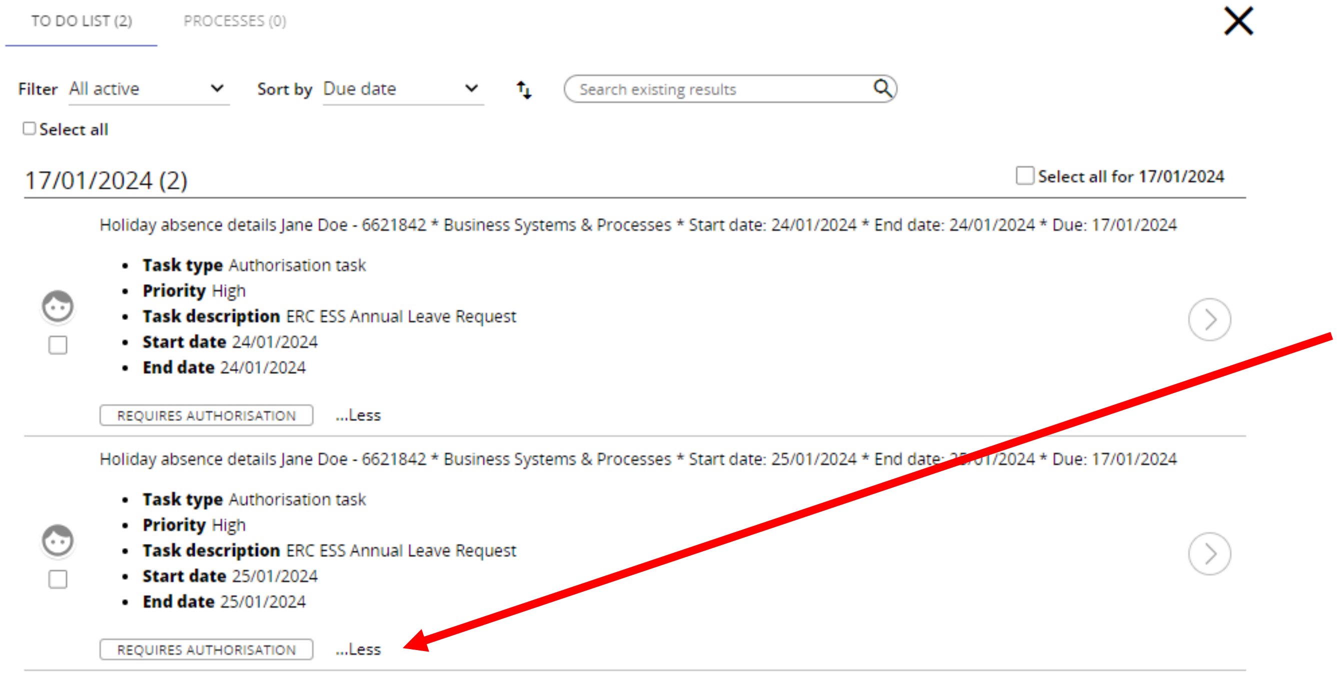
Annual Leave – How to authorise annual leave requests from your staff

- Log into Manager Self Service
- For any requests for leave from employee’s, these will appear in **“My to do list”**, click on this tile from the home page, you will also receive an email notification that there has been a request made for annual leave.

- You can then click on more to see more details of each request before clicking into these to view and authorise.



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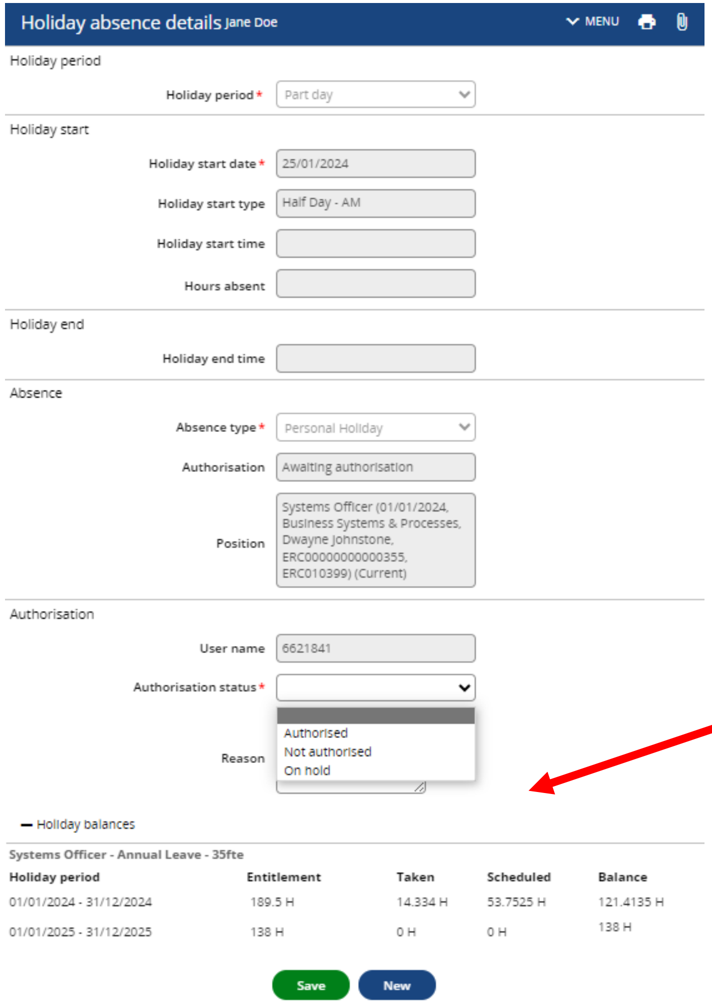
Annual Leave – How to authorise annual leave requests from your staff

- After selecting one item from the to do list to authorise the page shown below will appear with 3 options for the Authorisation status available, which are shown below, Authorised, Not Authorised or On hold if a decision to be made at a later date. A view of the balances are also available on this screen by expanding Holiday balances.



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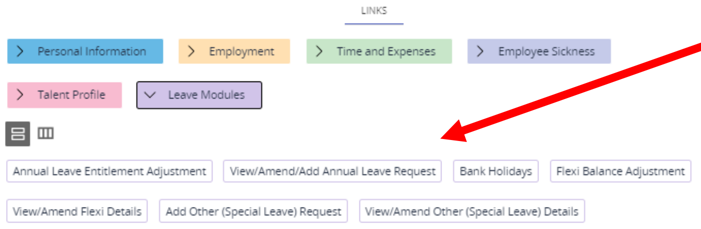
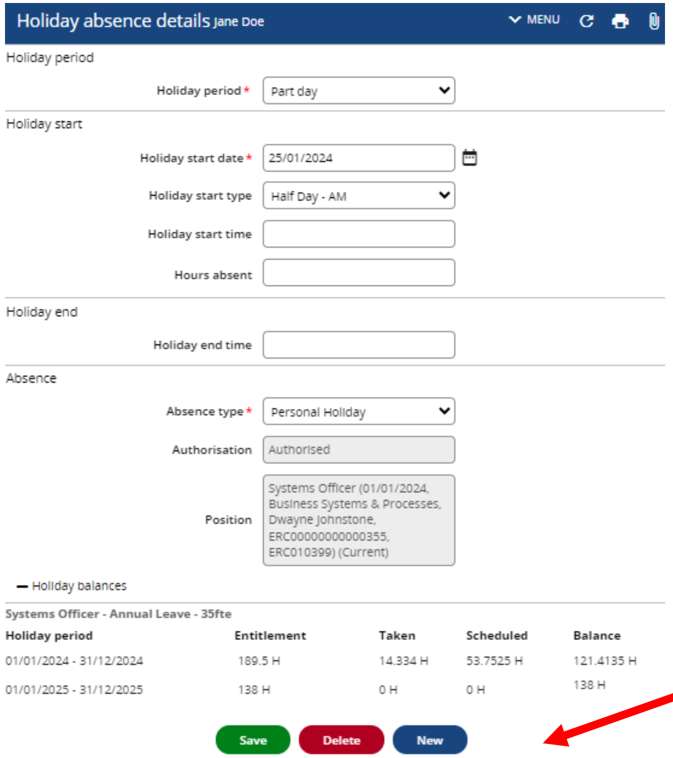
Annual Leave – How to delete/amend an annual leave absence for your staff

- After selecting the employee required, select the link for Leave Modules, then View/Amend/Add Annual Leave Request

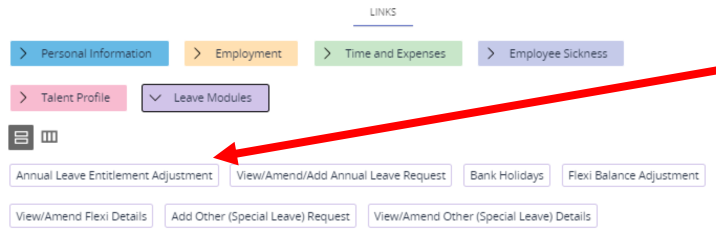


- The screen below will then be shown, which allows you to change Holiday period (Part day, Full day, More than one day, Holiday dates, Holiday start and end types (if not full day selected), or you can click delete to delete the absence.

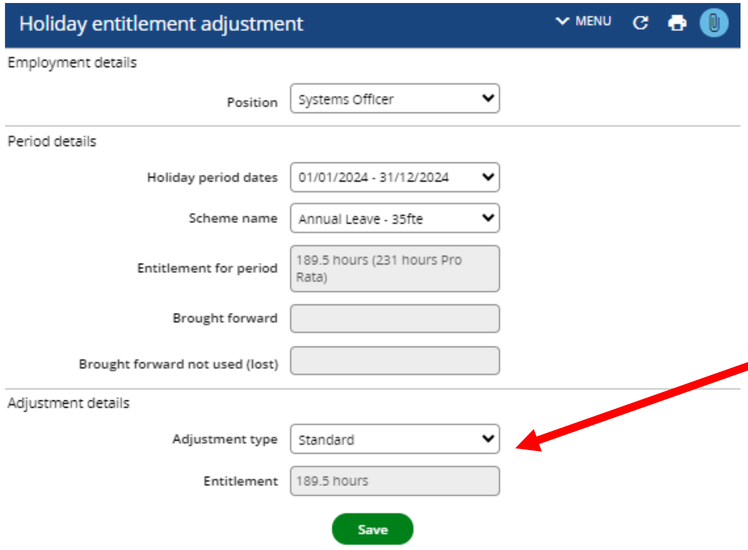


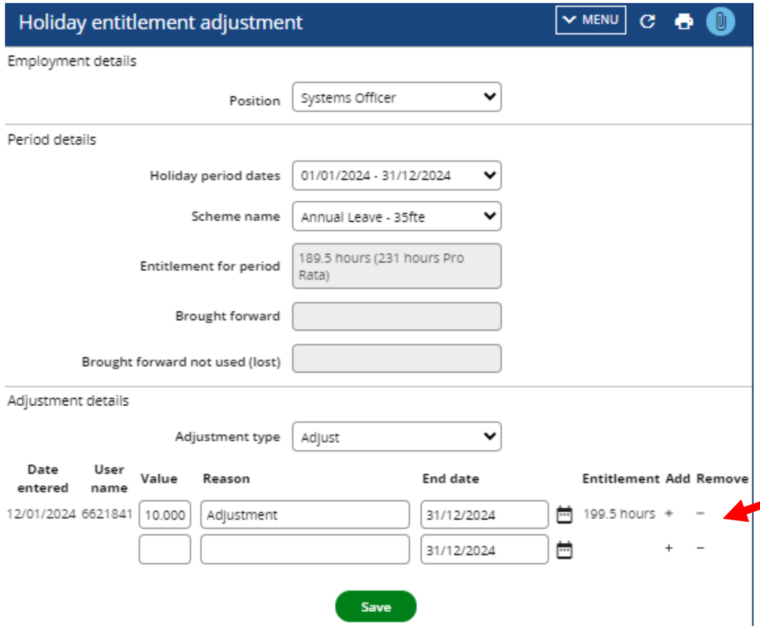
Annual Leave – How to adjust an annual leave balance

- After selecting the employee required, select the link for Leave Modules, then Annual Leave Entitlement Adjustment



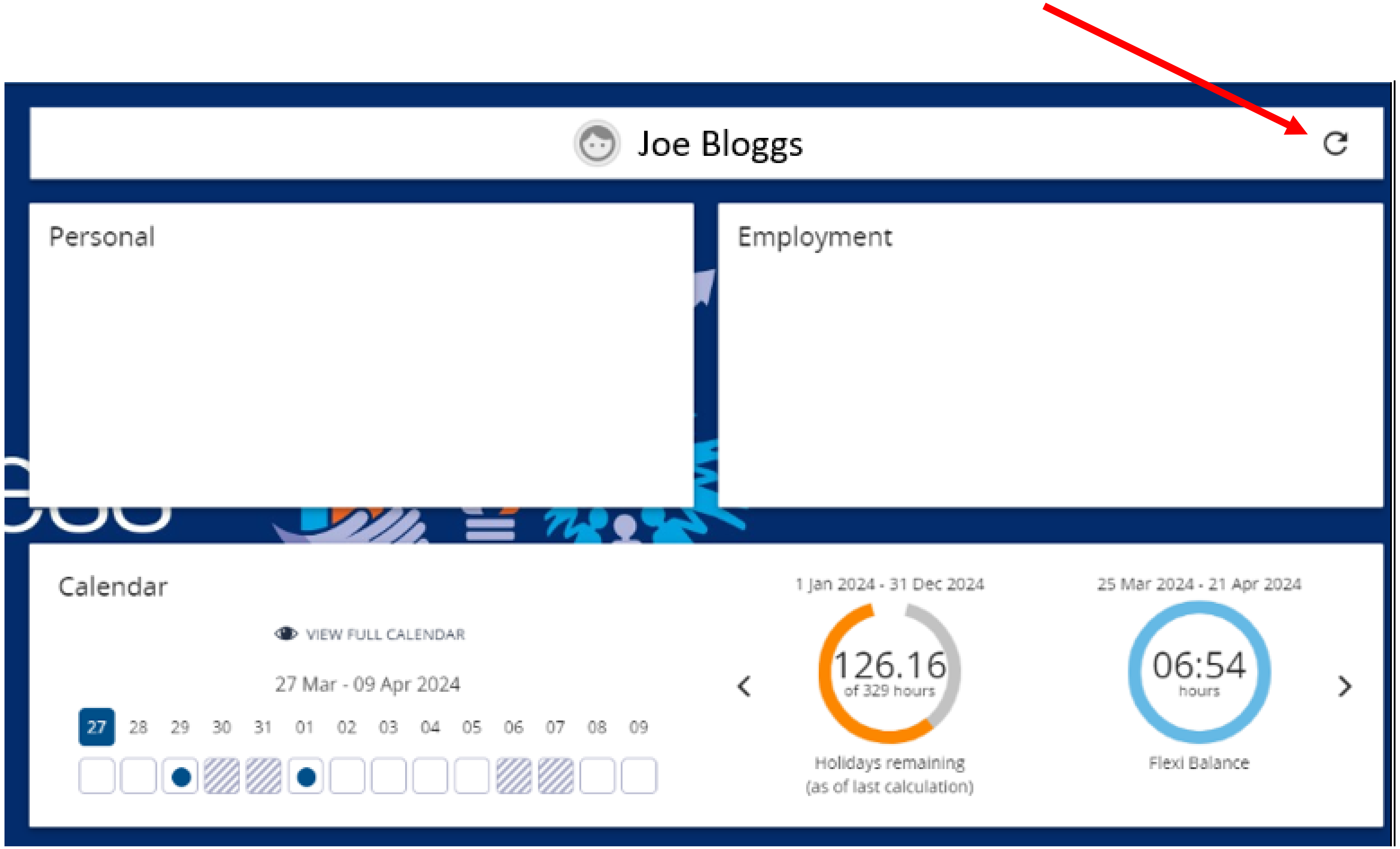
- The screen below will then be shown, which allows you to change Adjustment type from Standard to Adjust, boxes will then show to enter the adjustment – enter amount of hours, minutes will be in decimal form, e.g. 10 minutes = 0.17, the reason for adjustment and the end date of holiday year. Upon saving it will show the new entitlement, date entered and the user name of who entered the adjustment.





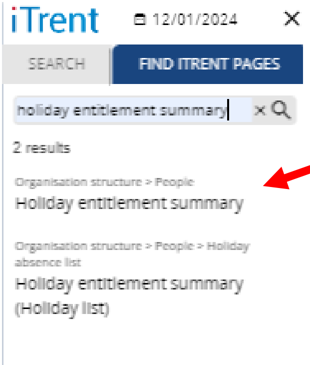
Annual Leave – How to adjust an annual leave balance

- If you have made an adjustment but it isn't reflected in the hours remaining balance on the employee record, hit the refresh button on iTrent

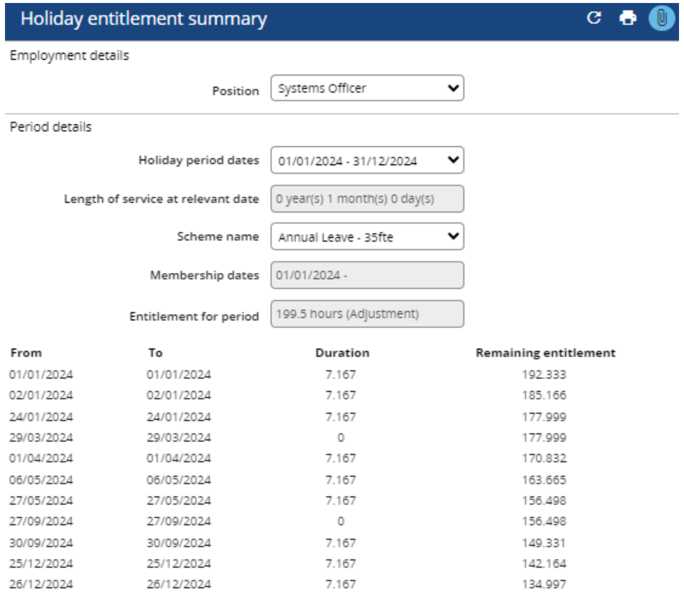


Annual Leave – How to view Holiday Entitlement Summary

- After selecting the employee required, type into Find iTrent Pages “Holiday Entitlement Summary”



- This will allow you to view the full year’s holiday entitlement summary, showing the hours for each date and the balances. Makes this a good way to spot any dates which may not be deducting the correct amount of hours.


Holiday entitlement summary

Employment details

Position: Systems Officer

Period details

Holiday period dates: 01/01/2024 - 31/12/2024

Length of service at relevant date: 0 year(s) 1 month(s) 0 day(s)

Scheme name: Annual Leave - 35fte

Membership dates: 01/01/2024 -

Entitlement for period: 199.5 hours (Adjustment)

From	To	Duration	Remaining entitlement
01/01/2024	01/01/2024	7.167	192.333
02/01/2024	02/01/2024	7.167	185.166
24/01/2024	24/01/2024	7.167	177.999
29/03/2024	29/03/2024	0	177.999
01/04/2024	01/04/2024	7.167	170.832
06/05/2024	06/05/2024	7.167	163.665
27/05/2024	27/05/2024	7.167	156.498
27/09/2024	27/09/2024	0	156.498
30/09/2024	30/09/2024	7.167	149.331
25/12/2024	25/12/2024	7.167	142.164
26/12/2024	26/12/2024	7.167	134.997

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Special Leave

- On occasions, employees may require special leave where the use of annual leave may not be appropriate. You can view the scheme of special leave on the intranet https://intranet.erc.insider/special_leave

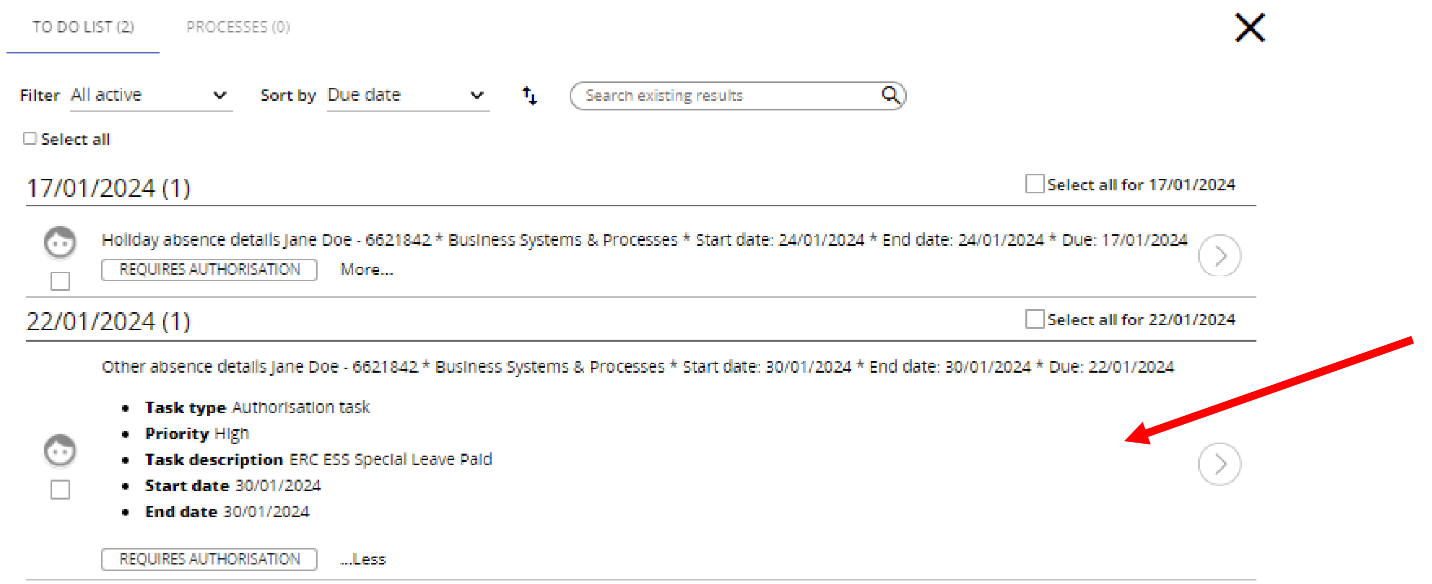
- Only those security profiles who have access to special leave on ESS will be able to submit any requests electronically (e.g. ex Etarmis users). Special leave types are categorised as either ‘paid’ or ‘unpaid’ periods of leave. If employees request a period of unpaid special leave, this amount will be deducted from the appropriate pay. If they are requesting a period of paid special leave, this will not show on their payslip and no payroll deductions will take place.

- All requests for paid special leave made through ESS will come to you as line manager for authorisation. If the request cannot be approved, please liaise with the employee to provide a reason.

- If a period of unpaid special leave is required, please contact HR Direct

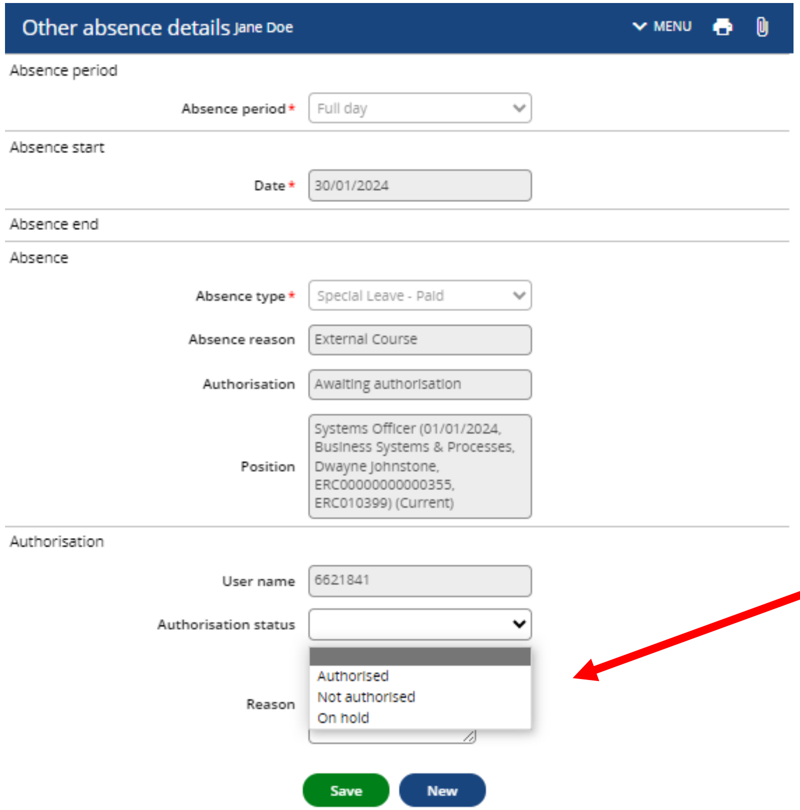
Special Leave – How to authorise special leave requests from your staff

- Log into Manager Self Service
- Click on your To Do list
- Click on **'More'** to view the details of the request, you will also receive an email notification that a request for Special Leave has been submitted.



- Once you have viewed the details and considered the request, proceed by clicking onto the request from the to do list, which will then give options to Authorise, Not authorised or On Hold if a decision has yet to be made on the authorisation status. A screen shot is provided on the next slide.

Special Leave – How to authorise special leave requests from your staff



- If you are unsure about the absence type requested, please refer to the Scheme of Special Leave for guidance
- If the request is not approved, please liaise with the employee to provide a reason
- An email will then be sent to the employee informing them of the decision made

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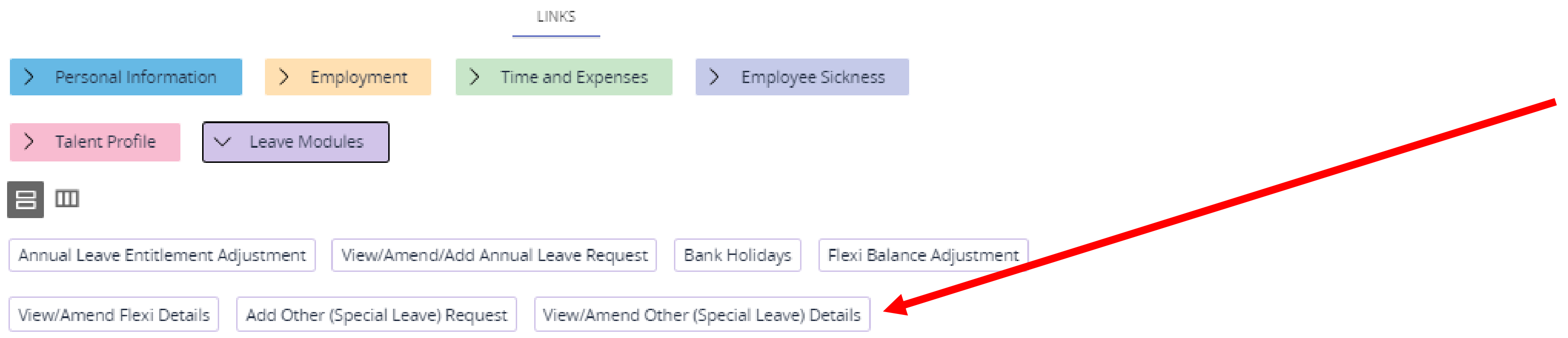
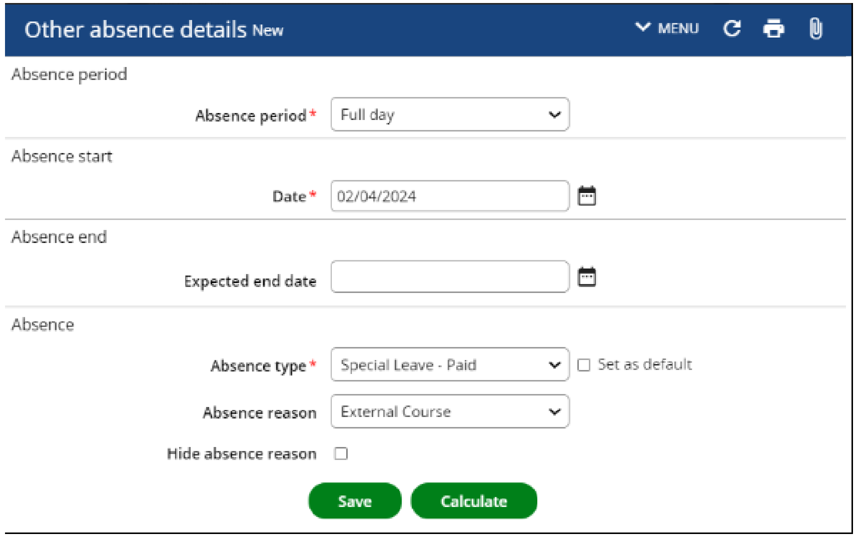
Special Leave – How to add/view/amend Special Leave for your staff

- By navigating to the Leave Modules link after selecting the relevant employee, select the option for Add Other (Special Leave) Request, or to view/amend in the same way as annual leave click on View/Amend Other (Special Leave) Details



- This will allow you to enter a special leave absence for the employee, example provided below



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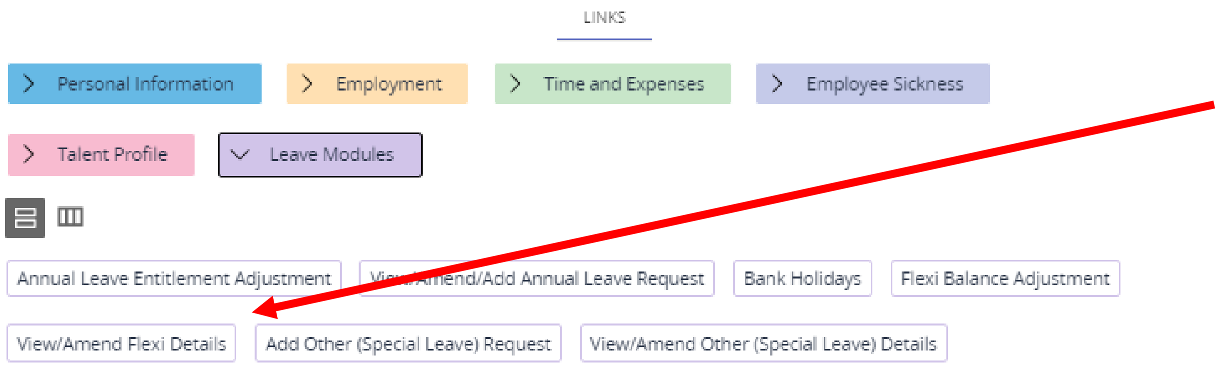
Flexi Leave

- Core working hours are 8am – 6pm
- No flexi terminals – all recordings must be made via Employee Self Service
- One time flexi recording per day – start & finish time and length of break(s)
- Recordings can be made in retrospect if employee forgets to record on the day, provided still in current flexi period
- Recordings cannot be made out with the current flexi period
- No miscellaneous time adjustment request – any corrections/adjustments to bookings need to be made by you as the Manager
- Employees can carry forward 15 hours (pro-rata) at the end of each flexi period (automatically processed)
- Negative adjustments have an upper limit that can be done in one transaction this is -999 minutes.
- If a further negative adjustment needs to be done as employee carries a higher negative balance, then admin/manager will need to make a second negative adjustment
- There is no limit on a negative an employee can go into
- Time will not be deducted from the employee however, if a time recording is not made (different from Etarmis)

Flexi Leave – How to view an employees flexi details

- Log into Manager Self Service
- Select relevant employee and navigate to Leave Modules then click View/Amend Flexi Details



- A list will appear on the left-hand pane showing flexi time entries, upon selecting one it will then show the details on the right-hand pane. Screen shot shown on following slide.

Flexitime list

Show all

Start date/time	Start day	End date/time	End day	Position	Type	Hours (hh:mm)	Authorisation status
11/01/2024 08:00	Thu	11/01/2024 18:00	Thu	Systems Officer	Record	09:00	Not applicable
10/01/2024 08:00	Wed	10/01/2024 18:00	Wed	Systems Officer	Record	09:00	Not applicable
01/01/2024				Systems Officer	Brought forward	00:00	

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Flexi Leave – How to view an employees flexi details

Flexitime details 11/01/2024 08:00 — MENU

Record/Book

Type*	Record

Flexitime start

Start date*	11/01/2024
Start time*	08:00

Flexitime end

End date	11/01/2024
End time	18:00

Flexitime

Position*	Systems Officer (01/01/2024,

Break details

Length of break (minutes)	60

Location

No location recorded

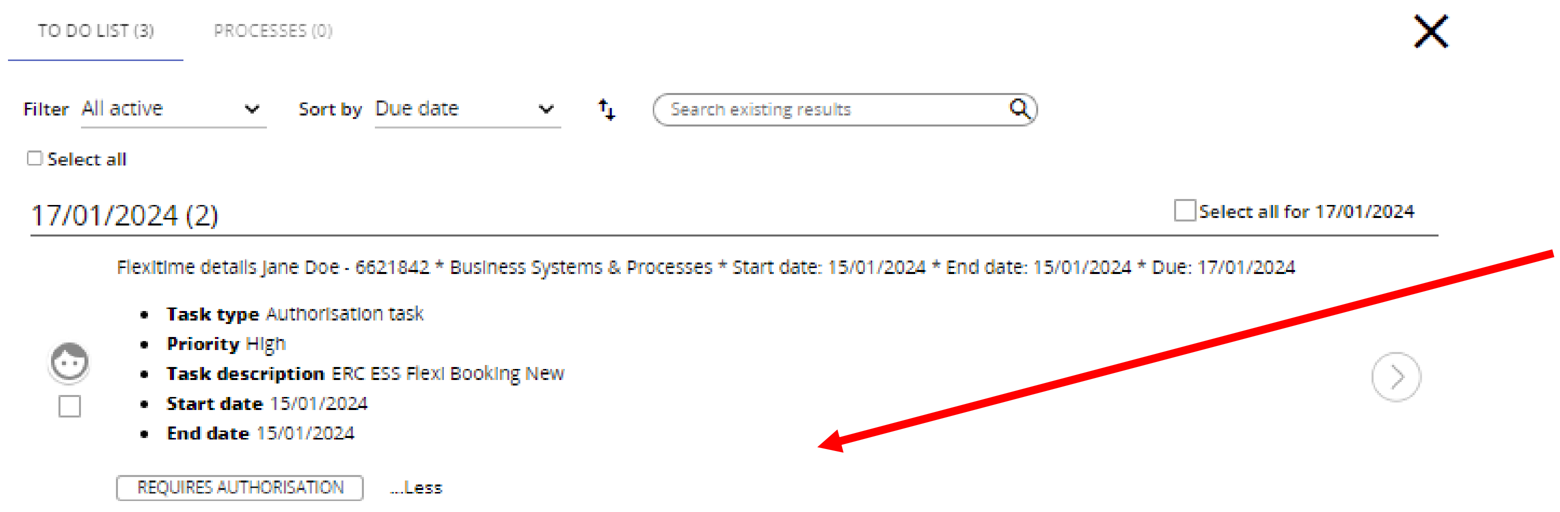
Additional details

Total time (hours:minutes)	09:00
Note	
Authorisation	Not applicable

Save | Delete | New

Flexi Leave – How to authorise flexi leave requests from your staff

- Log into Manager Self Service
- Click on your To Do list
- Click on **'More'** to view the details of the request, you will also receive an email notification that a request for Flexi time booking has been submitted.



- Once you have viewed the details and considered the request, proceed by clicking onto the request from the to do list, which will then give options to Authorise, Not authorised or On Hold if a decision has yet to be made on the authorisation status. A screen shot is provided on the next slide.

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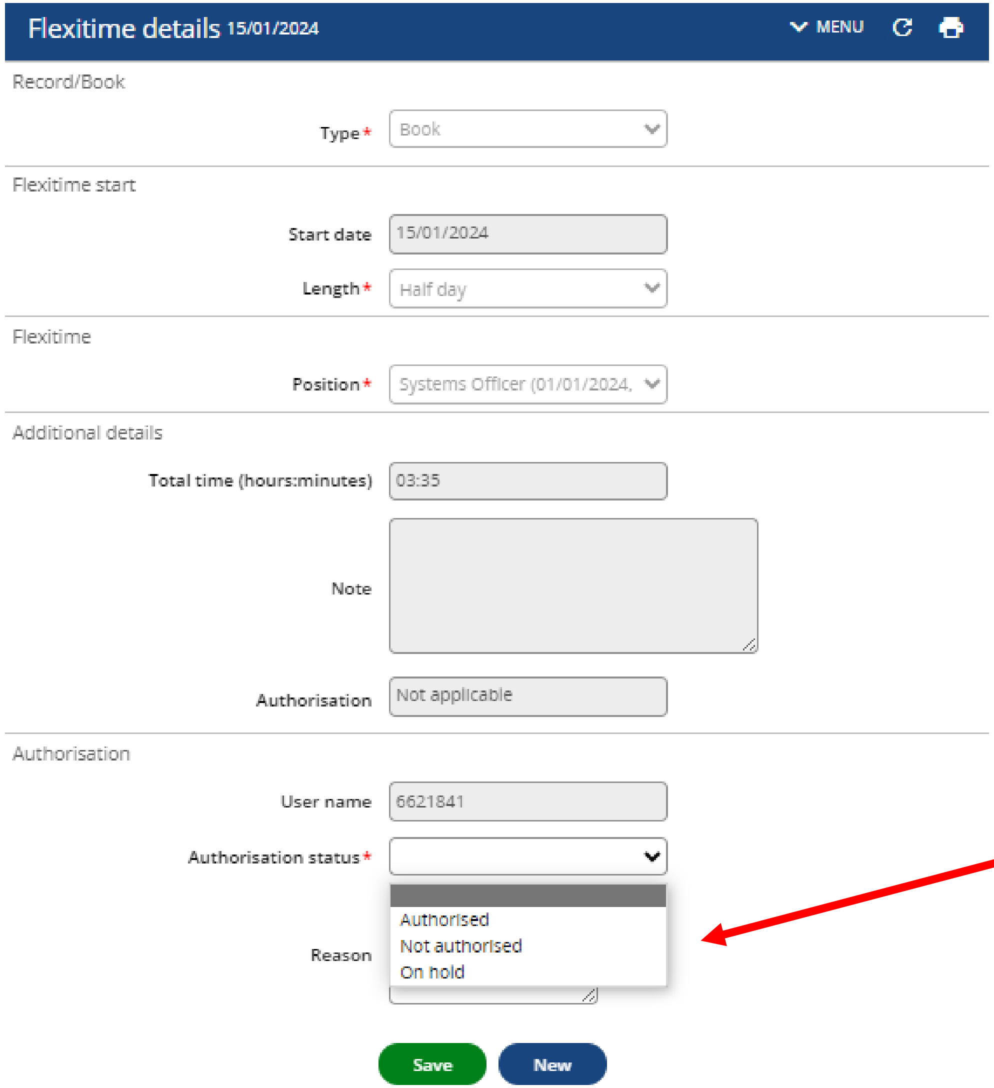
Flexi Leave – How to authorise flexi leave requests from your staff



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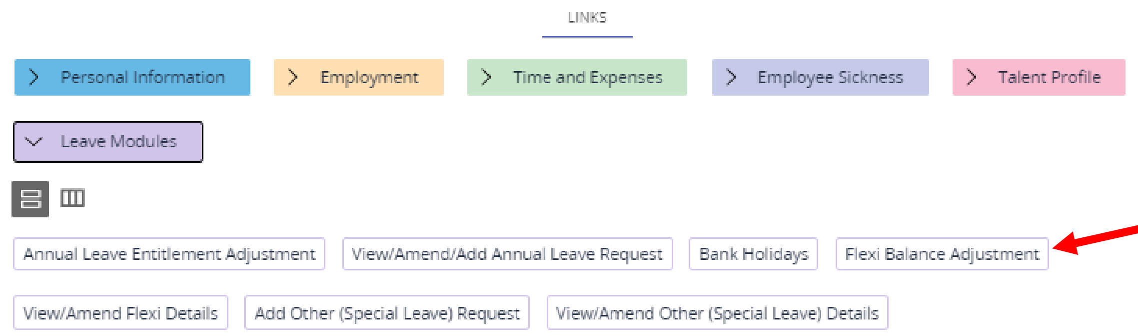
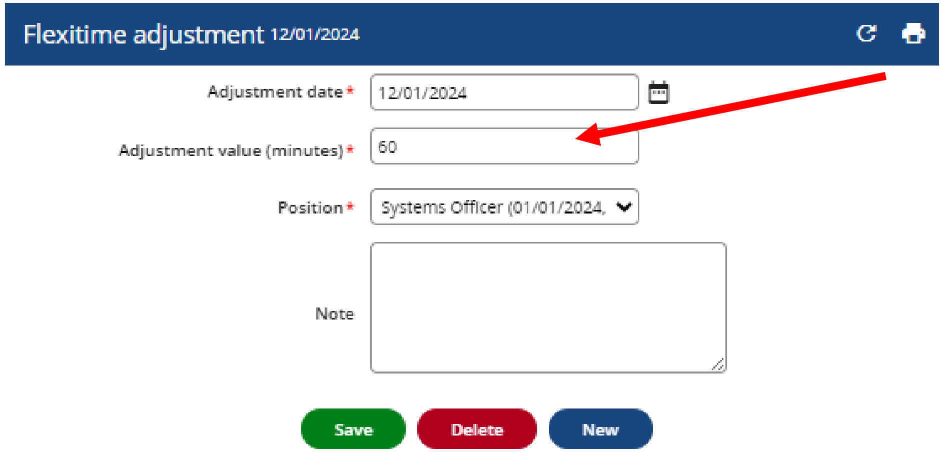
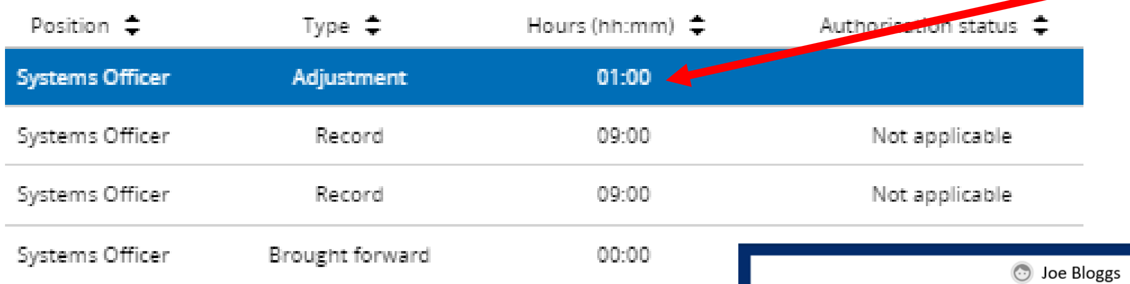
Flexi Leave – How to make a flexi adjustment for your staff

- Log into Manager Self Service
- Select relevant employee and navigate to Leave Modules then click Flexi Balance Adjustment



- You will enter the adjustment in minutes, however on the left-hand pane it will confirm this in hours and minutes upon saving the entry.

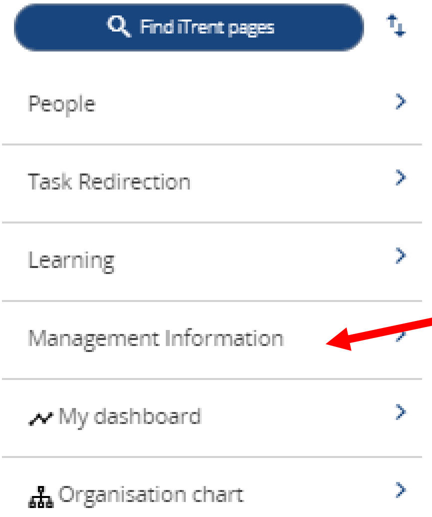




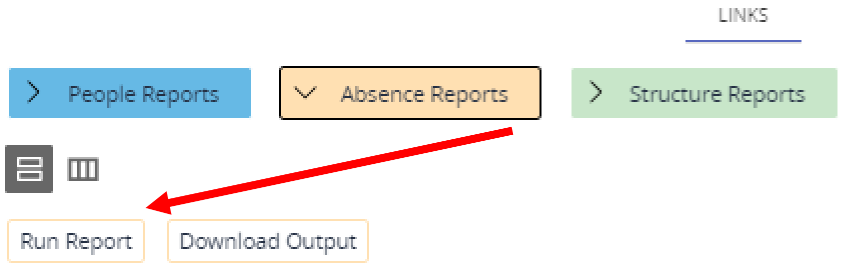
- If you make an adjustment but it isn’t showing on the flexi balance on the employee record, hit the refresh button on iTrent

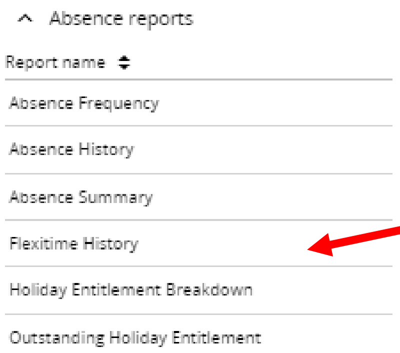
Leave – How to run leave reports

- Log into Manager Self Service
- Navigate to Management Information



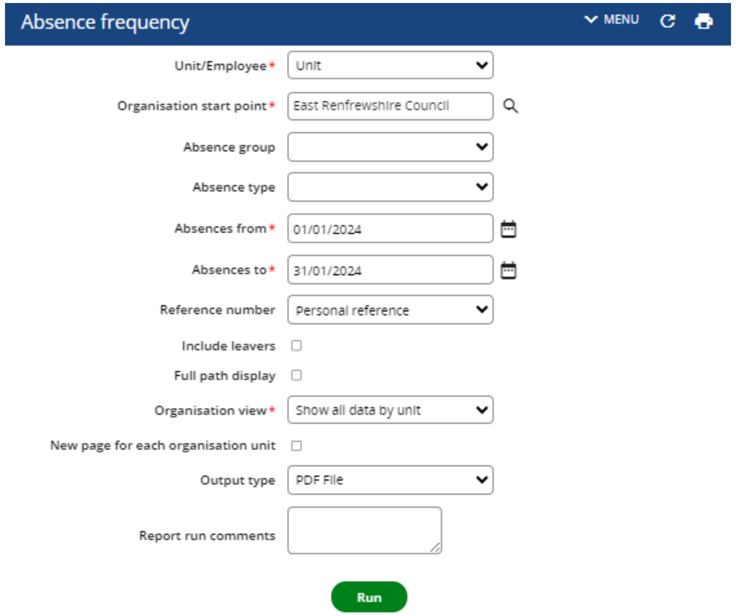
- Absence Reports link then click on Run Report which will populate a list on the left-hand pane





Leave – Absence Frequency Report

- Absence Frequency Report – example of selections before clicking run



iTrent East Renfrewshire Council

Absence Frequency

Absences From: 01/01/2024 **To:** 31/01/2024
Absence Group: All
Absence Type: All

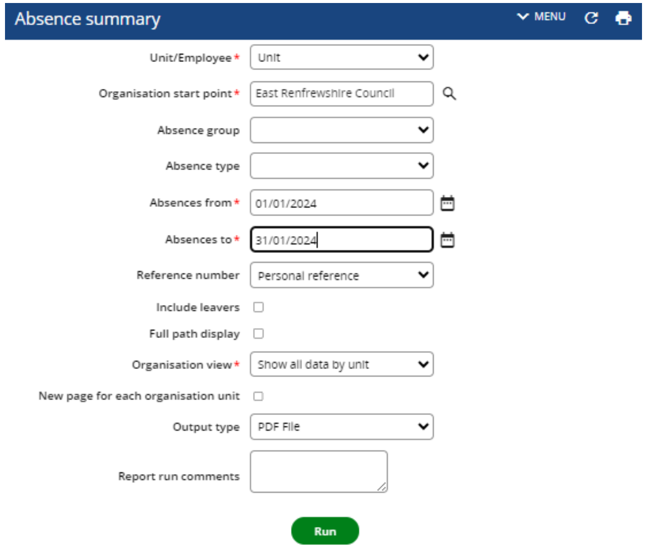
Organisational Start Point: East Renfrewshire Council
Organisation View: Full
Employee Name: All
Include Leavers: No

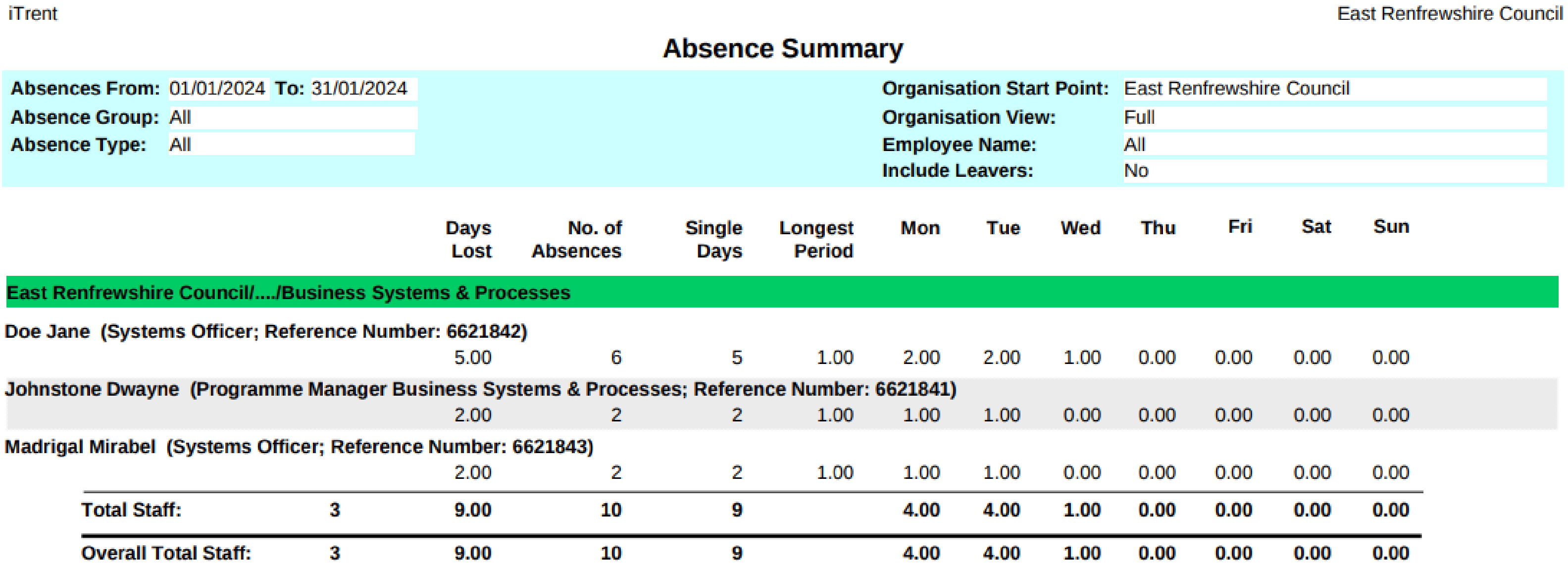
Organisation Unit	Absence Group	Absence Type	Number of Absences	Days Lost	Hours Lost
East Renfrewshire Council/.../Business Systems & Processes					
Doe Jane (Systems Officer; Reference Number: 6621842)					
	FLEXI	Flexitime	1	1.00	7.17
	Holiday	Personal Holiday	1	1.00	7.17
	Other	Special Leave - Paid	1	1.00	7.17
	Other	Special Leave - Unpaid	1	0.00	0.00
	SYS	Bank Holiday	2	2.00	14.33
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)					
	SYS	Bank Holiday	2	2.00	14.33
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)					
	SYS	Bank Holiday	2	2.00	14.33
		Totals	**10**	**9.00**	**64.50**
		Overall Totals	**10**	**9.00**	**64.50**

- Example of report in PDF shown above – can also be run as CSV output type

Leave – Absence Summary Report

- Absence Summary Report – example of selections before clicking run





iTrent | East Renfrewshire Council

Absence Summary

Absences From: 01/01/2024 **To:** 31/01/2024
Absence Group: All
Absence Type: All

Organisation Start Point: East Renfrewshire Council
Organisation View: Full
Employee Name: All
Include Leavers: No

		Days Lost	No. of Absences	Single Days	Longest Period	Mon	Tue	Wed	Thu	Fri	Sat	Sun
East Renfrewshire Council/..../Business Systems & Processes												
Doe Jane (Systems Officer; Reference Number: 6621842)												
		5.00	6	5	1.00	2.00	2.00	1.00	0.00	0.00	0.00	0.00
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)												
		2.00	2	2	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)												
		2.00	2	2	1.00	1.00	1.00	0.00	0.00	0.00	0.00	0.00
Total Staff:	**3**	**9.00**	**10**	**9**		**4.00**	**4.00**	**1.00**	**0.00**	**0.00**	**0.00**	**0.00**
Overall Total Staff:	**3**	**9.00**	**10**	**9**		**4.00**	**4.00**	**1.00**	**0.00**	**0.00**	**0.00**	**0.00**

- Example of report in PDF shown above – can also be run as CSV output type

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Leave – Absence History Report

- Absence History Report – example of selections before clicking run

Absence history MENU

Unit/Employee*	Unit
Organisation start point*	East Renfrewshire Council
Absence group	
Absence type	
Absences from*	01/01/2024
Absences to*	31/01/2024
Reference number	Personal reference
Include leavers	☐
Full path display	☐
Organisation view*	Show all data by unit
New page for each organisation unit	☐
Output type	PDF File
Report run comments	

Run

iTrent East Renfrewshire Council

Absence History

Absences From:	01/01/2024 **To:** 31/01/2024	**Organisation View:**	Full
Absence Group:	All	**Employee Name:**	All
Absence Type:	All	**Include Leavers:**	No
Organisation Start Point:	East Renfrewshire Council		

Absence Group	Absence Type	Absence Reason	Absent From	Absent To	Days Lost	Hours Lost	
East Renfrewshire Council/..../Business Systems & Processes							
Doe Jane (Systems Officer; Reference Number: 6621842)							
FLEXI	Flexitime		15/01/2024	15/01/2024	1.00	7.17	
Holiday	Personal Holiday		24/01/2024	24/01/2024	1.00	7.17	[1]
Other	Special Leave - Paid	External Course	30/01/2024	30/01/2024	1.00	7.17	[1]
Other	Special Leave - Unpaid	Medical/Dental Treatment - Unpaid	12/01/2024	12/01/2024	0.00	0.00	
SYS	Bank Holiday		02/01/2024	02/01/2024	1.00	7.17	
SYS	Bank Holiday		01/01/2024	01/01/2024	1.00	7.17	
				Employee Totals	**5.00**	**35.84**	
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)							
SYS	Bank Holiday		02/01/2024	02/01/2024	1.00	7.17	
SYS	Bank Holiday		01/01/2024	01/01/2024	1.00	7.17	
				Employee Totals	**2.00**	**14.33**	
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)							
SYS	Bank Holiday		02/01/2024	02/01/2024	1.00	7.17	
SYS	Bank Holiday		01/01/2024	01/01/2024	1.00	7.17	
				Employee Totals	**2.00**	**14.33**	
				Unit Totals	**9.00**	**64.50**	

- Example of report in PDF shown above – can also be run as CSV output type

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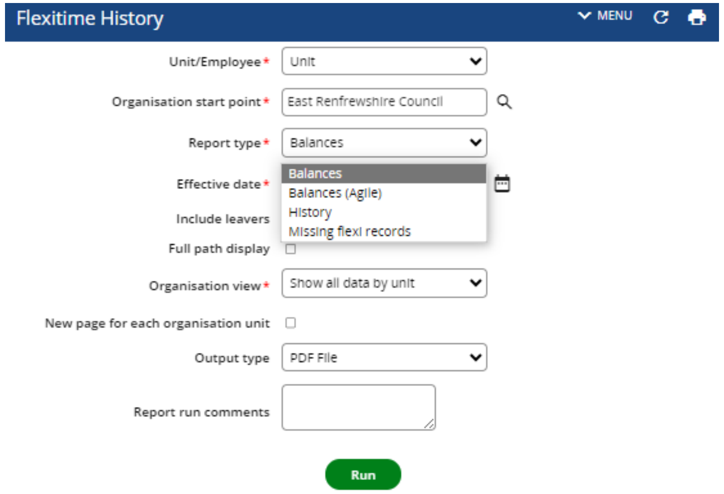
Leave – Flexitime History Report

- Flexitime History Report – example of selections before clicking run, different options shown in drop down list below



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Flexitime History

Absences From: 08/01/2024 **To:** 12/01/2024 **Organisation View:** Full
Employee Name: All **Include Leavers:** No
Organisation Start Point: East Renfrewshire Council

	Type	Start Date	Start Time	End Date	End Time	Break Length	Worked Hours	Shift Hours	Daily Balance
East Renfrewshire Council/....									
Doe Jane (Systems Officer; Reference Number: 6621842)									
	Adjustment	12/01/2024	00:00	12/01/2024			0.00	-1.00	1.00
	Record	11/01/2024	08:00	11/01/2024	18:00		9.00	7.10	1.50
	Break 1					1.00			
	Record	10/01/2024	08:00	10/01/2024	18:00		9.00	7.10	1.50
	Break 1					1.00			

iTrent — East Renfrewshire Council

Flexitime Balances

Balances To: 15/01/2024 **Organisation View:** Full
Employee Name: All **Include Leavers:** No
Organisation Start Point: East Renfrewshire Council

	Balance
East Renfrewshire Council/....	
Doe Jane (Systems Officer; Reference Number: 6621842)	1.05

iTrent — East Renfrewshire Council

Missing Flexi Records

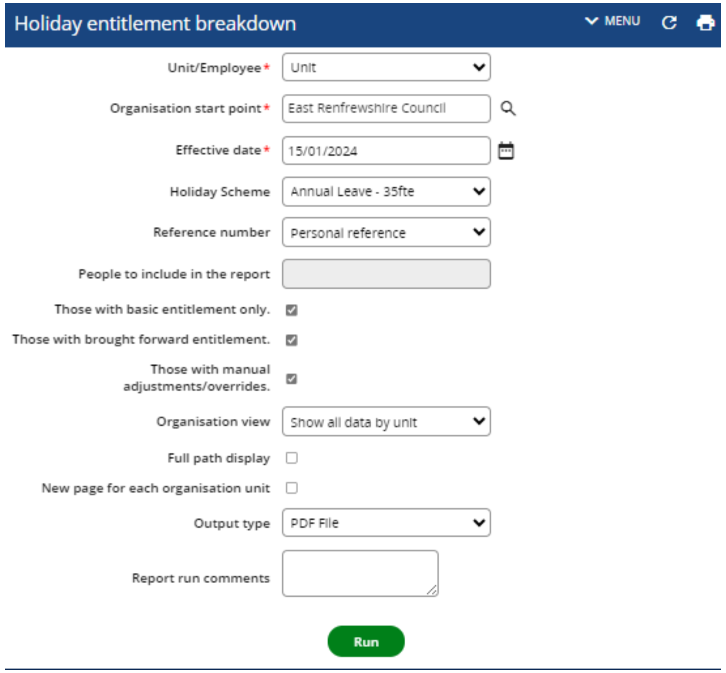
Absences From: 08/01/2024 **To:** 12/01/2024 **Organisation View:** Full
Employee Name: All **Include Leavers:** No
Organisation Start Point: East Renfrewshire Council

	No Clock In Date
East Renfrewshire Council/....	
Doe Jane (Systems Officer; Reference Number: 6621842)	08/01/2024
Doe Jane (Systems Officer; Reference Number: 6621842)	09/01/2024
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)	08/01/2024
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)	09/01/2024
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)	10/01/2024
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)	11/01/2024
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)	12/01/2024
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)	08/01/2024
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)	09/01/2024
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)	10/01/2024
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)	11/01/2024
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)	12/01/2024

- Flexitime History
- Flexitime Balances
- Missing Flexi Records
- Above three options results shown
- Can also be run in CSV output format

Leave – Holiday Entitlement Breakdown Report

- Holiday Entitlement Breakdown Report – example of selections before clicking run



iTrent

East Renfrewshire Council

Holiday Entitlement Breakdown

Effective Date:	12/01/2024	**Organisational Start Point:**	East Renfrewshire Council
Scheme:	Annual Leave - 35fte	**Organisation View:**	Full
Employee Name:	All Staff	**Path Display:**	Partial
		Reference No:	Personal

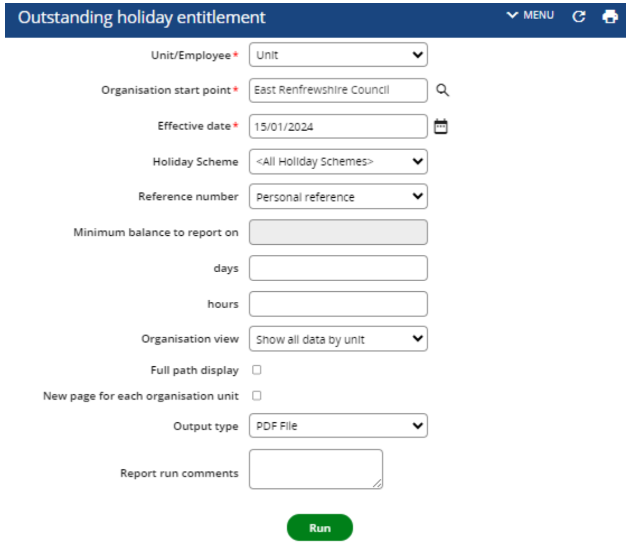
Scheme Name	Adjustment Reason	Unit	End of Holiday Yr	Basic Entitlement	B/F	B/F Lost	Adjustment	Override	Total Entitlement
East Renfrewshire Council/.../Business Systems & Processes									
Doe Jane (Systems Officer; Reference Number: 6621842)									
Annual Leave - 35fte	Adjustment	Hours	31/12/2024	189.50 *	0.00	0.00	10.00	0.00	199.50
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)									
Annual Leave - 35fte		Hours	31/12/2024	245.00	0.00	0.00	0.00	0.00	245.00
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)									
Annual Leave - 35fte		Hours	31/12/2024	245.00	0.00	0.00	0.00	0.00	245.00

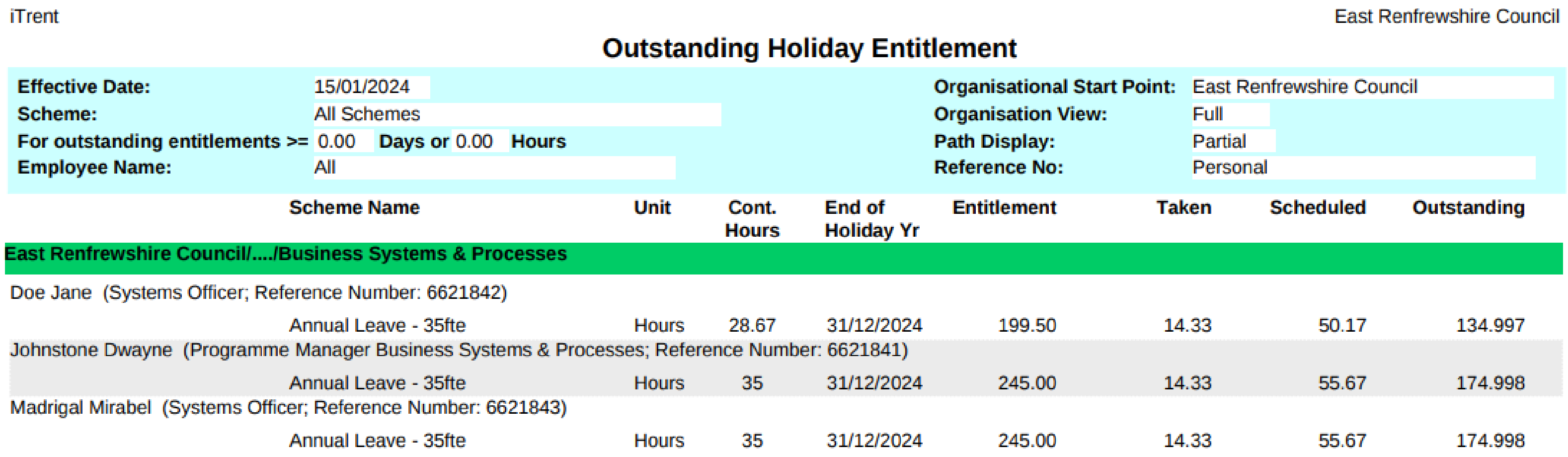
- Example of report in PDF shown above – can also be run as CSV output type
- Must select a Holiday Scheme in this report for results to be produced

Our values Ambition Kindness Trust

Leave – Outstanding Holiday Entitlement Report

- Outstanding Holiday Entitlement Report – example of selections before clicking run





iTrent — East Renfrewshire Council

Outstanding Holiday Entitlement

Effective Date:	15/01/2024	**Organisational Start Point:**	East Renfrewshire Council
Scheme:	All Schemes	**Organisation View:**	Full
For outstanding entitlements >=	0.00 **Days or** 0.00 **Hours**	**Path Display:**	Partial
Employee Name:	All	**Reference No:**	Personal

Scheme Name	Unit	Cont. Hours	End of Holiday Yr	Entitlement	Taken	Scheduled	Outstanding
East Renfrewshire Council/..../Business Systems & Processes							
Doe Jane (Systems Officer; Reference Number: 6621842)							
Annual Leave - 35fte	Hours	28.67	31/12/2024	199.50	14.33	50.17	134.997
Johnstone Dwayne (Programme Manager Business Systems & Processes; Reference Number: 6621841)							
Annual Leave - 35fte	Hours	35	31/12/2024	245.00	14.33	55.67	174.998
Madrigal Mirabel (Systems Officer; Reference Number: 6621843)							
Annual Leave - 35fte	Hours	35	31/12/2024	245.00	14.33	55.67	174.998

- Example of report in PDF shown above – can also be run as CSV output type