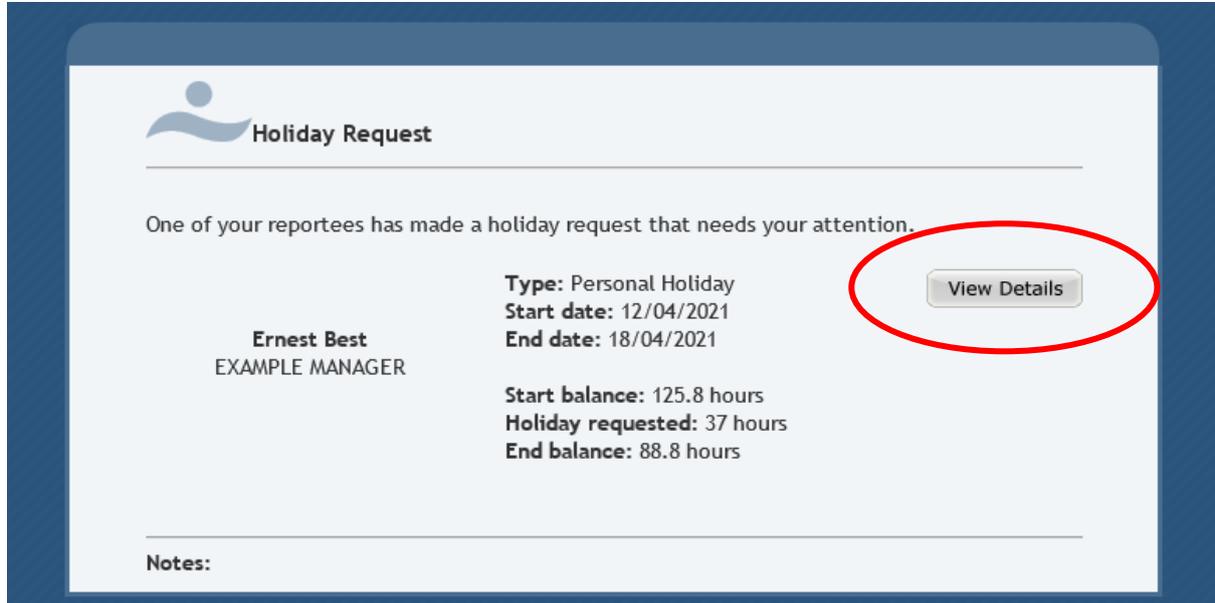


Authorising Leave through iTrent for Managers

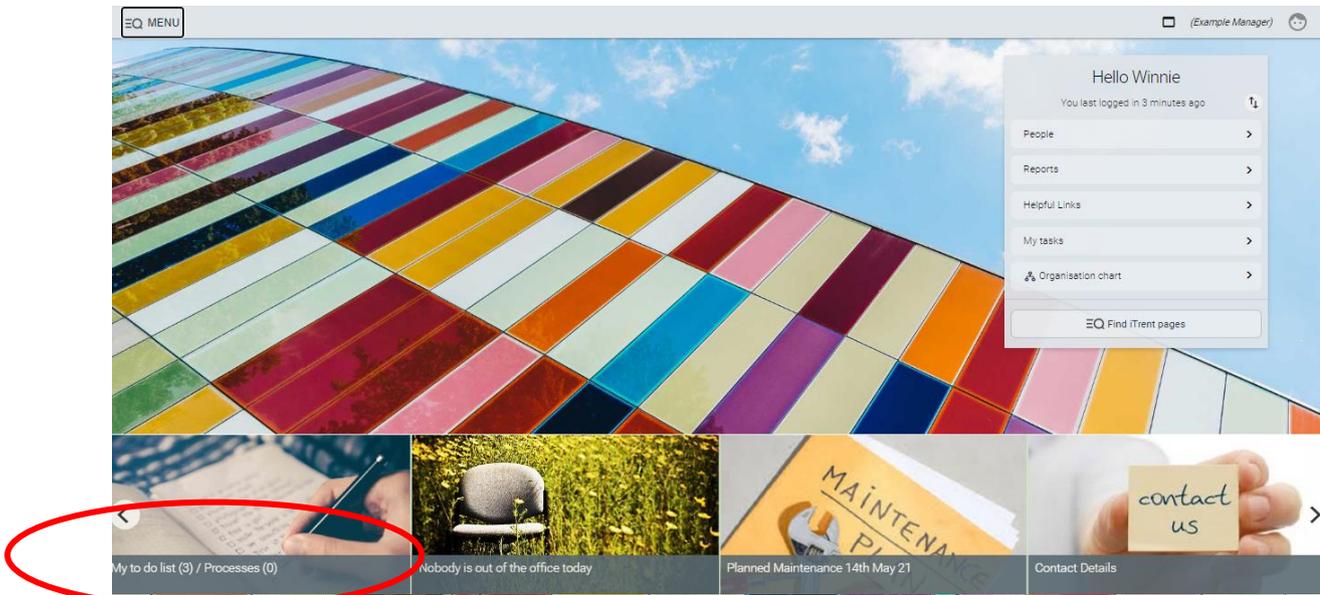
There are two ways to access an employee's Annual Leave request in iTrent.

You will receive an email detailing the employee's leave request. Click on the view details button.



This will take you through to the list of tasks which you have outstanding.

Alternatively, if you are already in iTrent click on your to do list



Once on the to do list click on the relevant holiday request

TO DO LIST (4) PROCESSES (0) ✕

Filter All active Sort by Due date Search existing results

Select all

29/03/2021 (1) Select all for 29/03/2021

 Time & Expenses claim Ernest Best - OT000007 (RDC Monthly) * EXAMPLE UNIT * Example Overtime Claim * **Previously authorised by BRAYBROOK_V**
Due: 29/03/2021 >

REQUIRES AUTHORISATION More...

30/03/2021 (2) Select all for 30/03/2021

 Time & Expenses claim ***Restricted***
Due: 30/03/2021 **Restricted** >

REQUIRES AUTHORISATION More...

 Time & Expenses claim Ernest Best - OT000007 (RDC Monthly) * EXAMPLE UNIT * Example Overtime Claim * Due: 30/03/2021 >

REQUIRES AUTHORISATION More...

01/04/2021 (1) Select all for 01/04/2021

 **Holiday absence details Ernest Best - 88888 * EXAMPLE UNIT * Start date: 12/04/2021 * End date: 18/04/2021 * Due: 01/04/2021** >

REQUIRES AUTHORISATION More...

This will take you onto the holiday request.

You can check your employee's holiday balances by clicking on the plus sign next to holiday balances at the bottom of the screen.

To authorise or not authorise, select the correct option from the Authorisation Drop down menu. If you select Not Authorised you must put a reason in the Reason box below. Once you click save your employee will receive an email informing them whether their request is authorised or not authorised and the reason why if it has not been authorised.

< To do list / processes Ernest Best

Holiday absence details Ernest Best MENU

Holiday period
Holiday period

Holiday start
Holiday start date
Holiday start type
Holiday start time
Hours absent

Holiday end
Holiday end date
Holiday end type
Holiday end time
Hours absent

Absence
Absence type
Authorisation
Position

Authorisation

User name

Authorisation status

Reason

— Holiday balances

EXAMPLE MANAGER - RDC Scale 1 - 6 holiday				
Holiday period	Entitlement	Taken	Scheduled	Balance
01/01/2020 - 31/03/2020 (Part)	162.8 H	0 H	0 H	162.8 H
01/04/2020 - 31/03/2021	162.8 H	7.5 H	7.5 H	147.8 H
01/04/2021 - 31/03/2022	162.8 H	0 H	74 H	88.8 H

You can also see an employee's holiday record by going to 'People' in the quick links on the front page and selecting the employee you wish to look at. 1. Here you can see a summary calendar showing and absence and a remaining entitlement field. By clicking on the Holiday menu (2) at the bottom of the page you can visit various screens including where to enter an annual leave booking for an employee who may be having difficulty with booking leave themselves.

Personal
Known as Ernest born on 26/11/1972
88888 (Personal ref.)

Employment
EXAMPLE MANAGER | EXAMPLE UNIT
37.00 hours | Employee | Full time | Permanent | Scale P002 | Scalepoint 28
Occupancy started on 01/01/2020
Reporting manager
Winnie Best
Example Director

Calendar
VIEW FULL CALENDAR
28 Mar - 10 Apr 2021

1 Apr 2020 - 31 Mar 2021: 147.8 of 162.8 hours (Holidays remaining as of last calculation) [1]

28 Mar 2020 - 28 Mar 2021: 0 (No sickness as of last calculation)

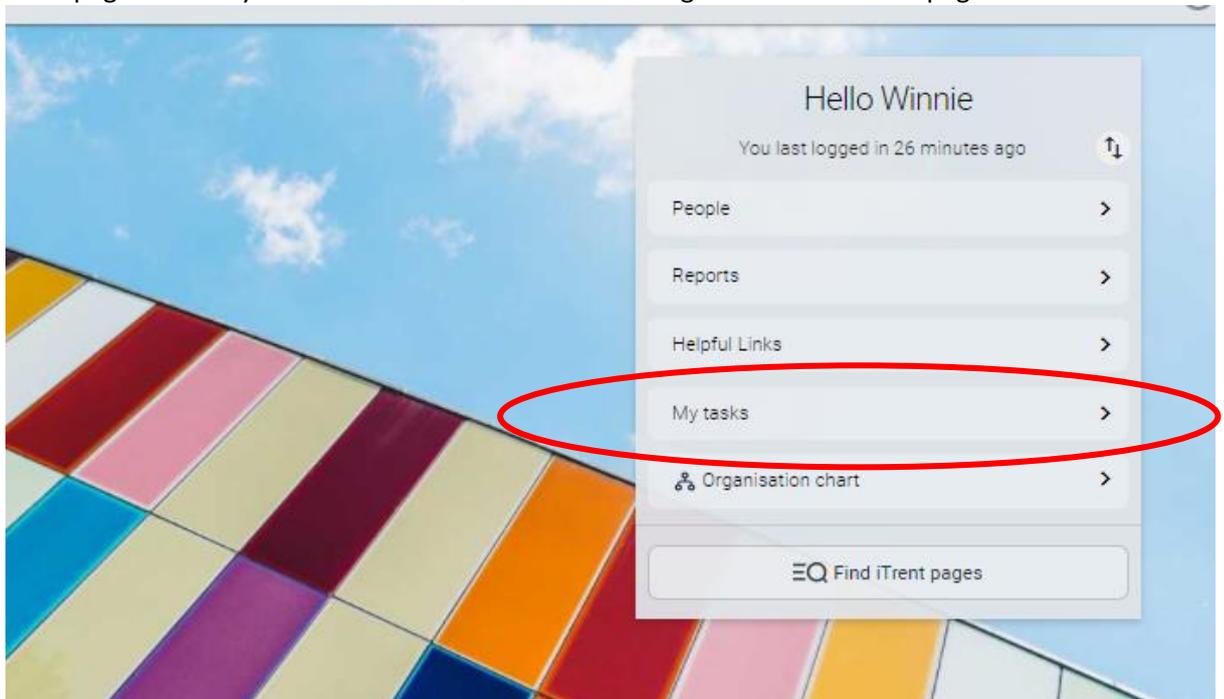
LINKS

Personal Information | Position Information | Sickness | Time and Expenses | **Holiday**

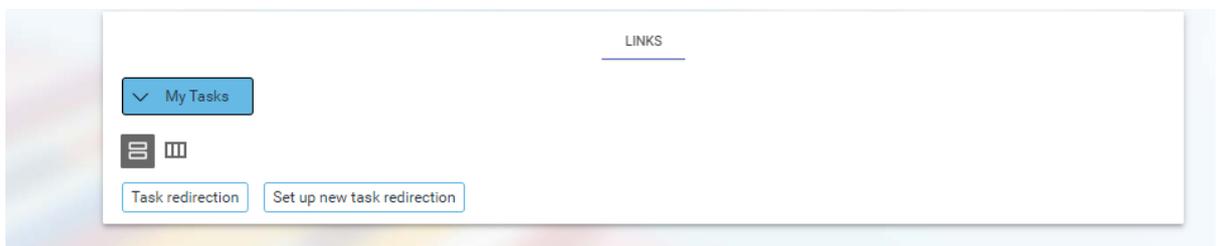
Holiday Details | Holiday Entitlement Summary | Holiday Calendar | New - Holiday Absence Details [2]

If you are going to be on leave you can set the system to send your tasks, for authorisation, to someone else in your absence.

On the home page select My Tasks from the Quick links on the right hand side of the page



Go to Set up a new task redirection



Enter the start and end dates of your absence.

In the 'Process Type' drop down menu select 'Redirect all'

Use the magnifying glass to search for the person who your tasks need to be redirected to.

Click Save

The screenshot shows a web interface for managing task redirections. The main heading is "My task redirections". Below it is a dark header bar with the text "My task redirection details" followed by "New" and a dropdown arrow, and "MENU" with three icons (refresh, print, and attachment). The form contains four fields: "Start date" with the value "01/06/2021" and a calendar icon; "End date" with the value "08/06/2021" and a calendar icon; "Process type" with a dropdown menu showing "Redirect all" and a downward arrow; and "Redirect to" with the value "CBEST" and a magnifying glass icon. A green "SAVE" button is positioned below the form.