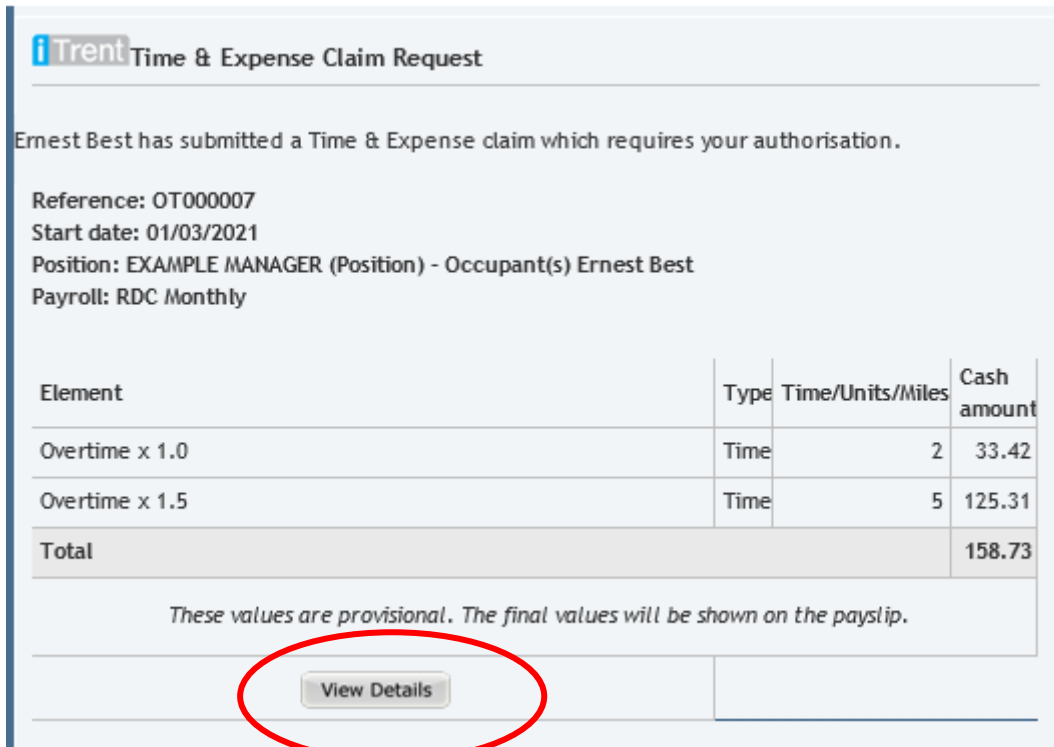


Authorising Time and Expenses through iTrent for Managers

There are two ways to access an employee's Time and Expenses Claims in iTrent.

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



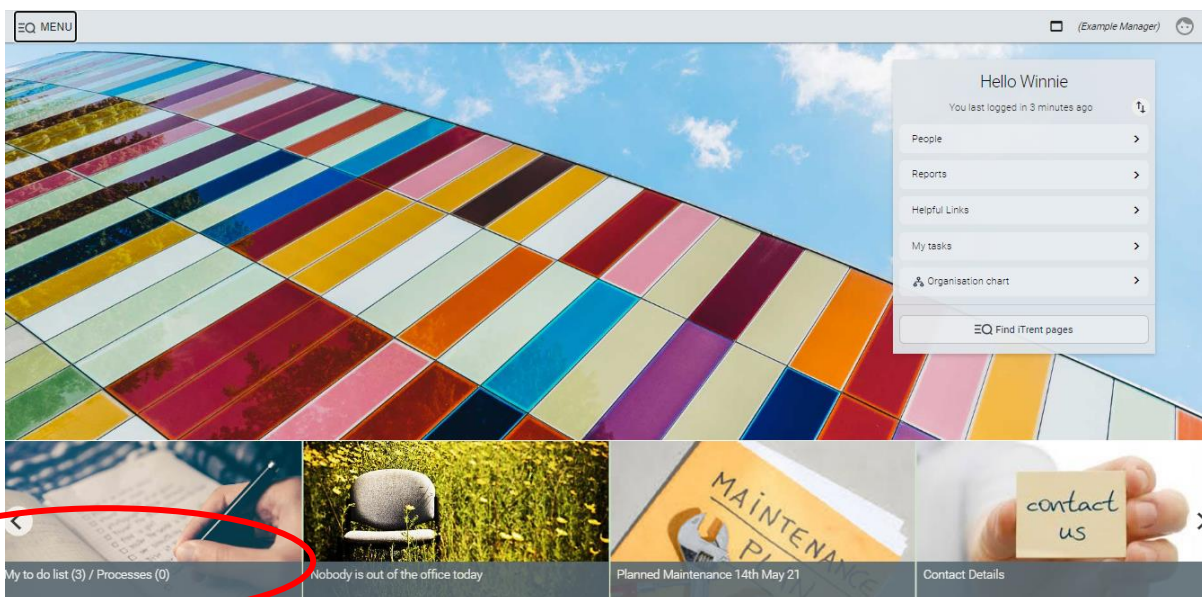
The screenshot shows the iTrent interface for a Time & Expense Claim Request. The header includes the iTrent logo and the title "Time & Expense Claim Request". The main content area states: "Ernest Best has submitted a Time & Expense claim which requires your authorisation." Below this, the following details are listed: Reference: OT000007, Start date: 01/03/2021, Position: EXAMPLE MANAGER (Position) - Occupant(s) Ernest Best, and Payroll: RDC Monthly. A table follows, showing the breakdown of the claim:

Element	Type	Time/Units/Miles	Cash amount
Overtime x 1.0	Time	2	33.42
Overtime x 1.5	Time	5	125.31
Total			158.73

Below the table, a note states: "These values are provisional. The final values will be shown on the payslip." At the bottom of the page, a "View Details" button is circled in red.

This will take you directly through to the claim form.

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



The screenshot shows the iTrent dashboard for a user named Winnie. The dashboard includes a header with "EQ MENU" and "(Example Manager)". A user profile card for Winnie is visible, showing "Hello Winnie" and "You last logged in 3 minutes ago". Below the profile card, there are links for "People", "Reports", "Helpful Links", "My tasks", and "Organisation chart". A search bar labeled "EQ Find iTrent pages" is also present. The main content area features a large, colorful, abstract graphic. At the bottom, there is a navigation bar with four items: "My to do list (3) / Processes (0)", "Nobody is out of the office today", "Planned Maintenance 14th May 21", and "Contact Details". The "My to do list" item is circled in red.


Once on the to do list click on the relevant claim form

TO DO LIST (4) PROCESSES (0) ✕


Filter All active ▼ Sort by Due date ▼ ↑↓


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 >

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

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

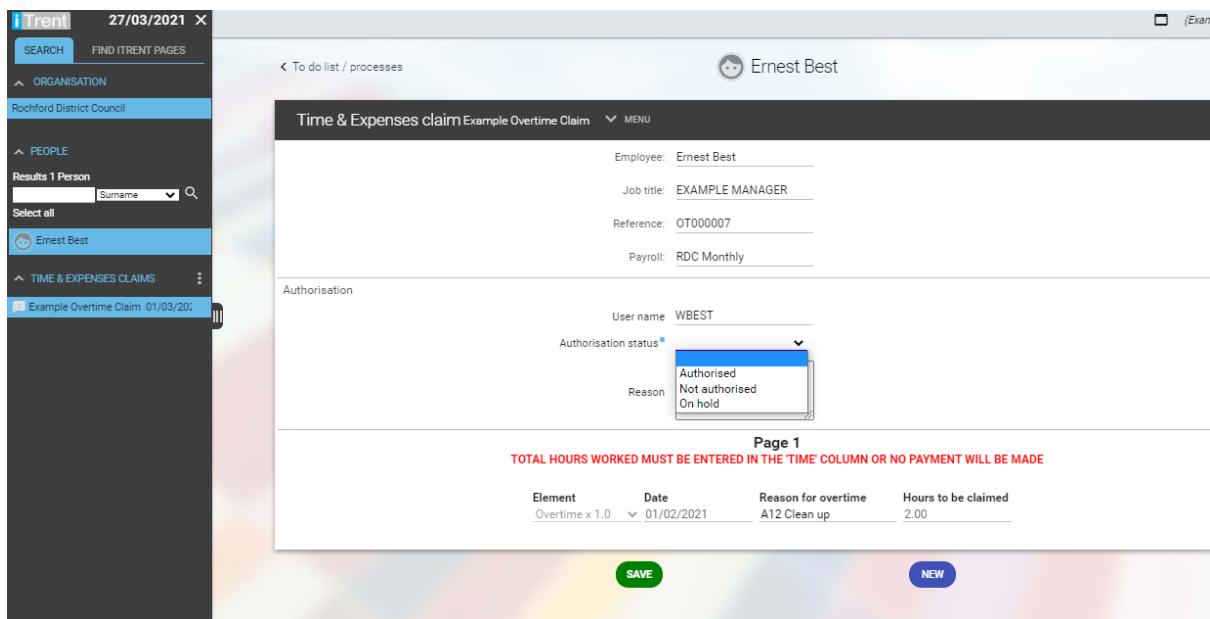
 Time & Expenses claim Ernest Best - OT000007 (RDC Monthly) * EXAMPLE UNIT * Example Overtime Claim * Due: 30/03/2021 >

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

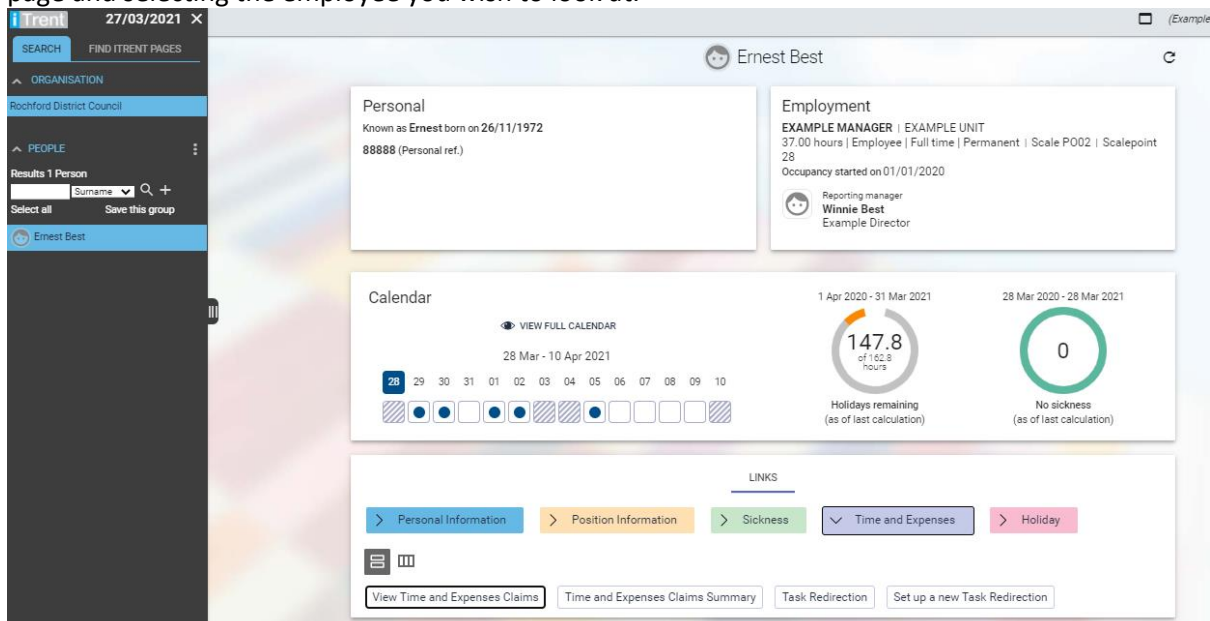
 Holiday absence details Ernest Best - 88888 * EXAMPLE UNIT * Start date: 12/04/2021 * End date: 18/04/2021 * Due: 01/04/2021 >

This will take you onto the time and expenses claim.

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 claim is authorised or not authorised and the reason why if it has not been authorised.

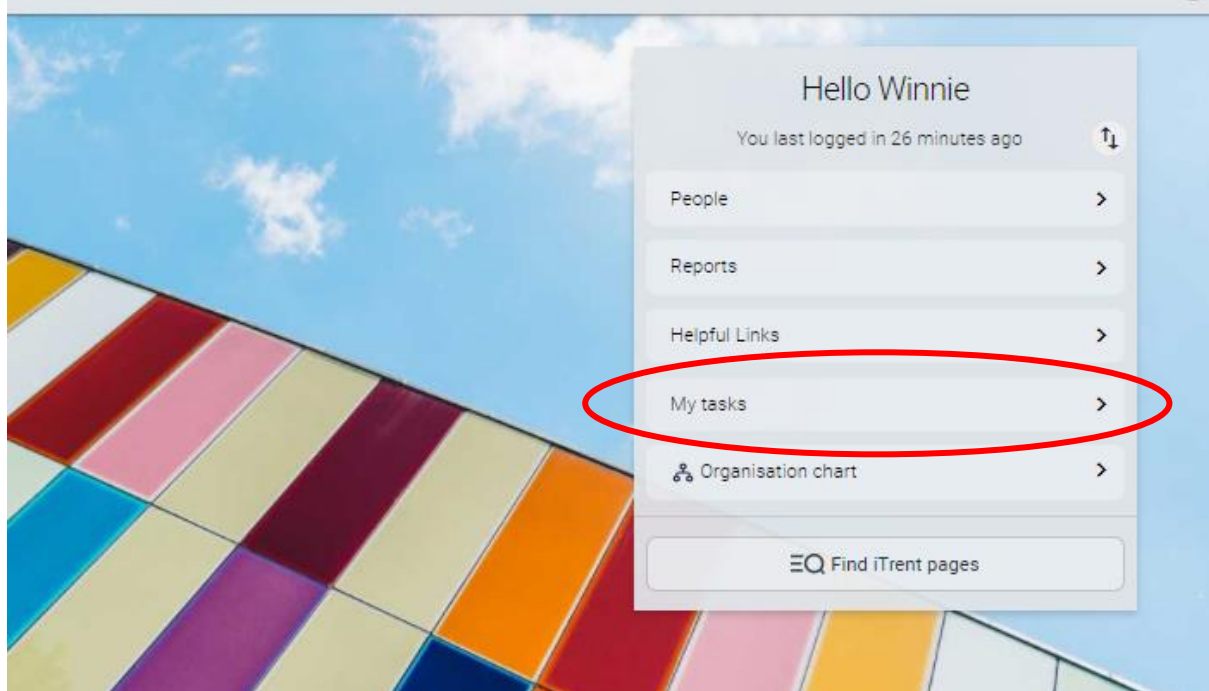


You can also see an employee's historical claims by going to 'People' in the quick links on the front page and selecting the employee you wish to look at.

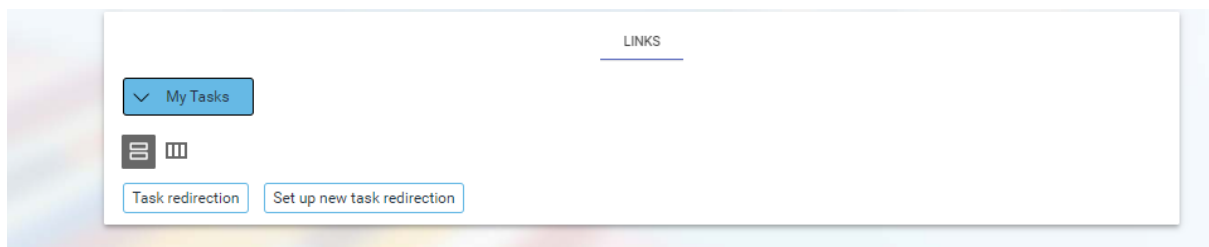


If you are going to be on leave you can set the system to send your tasks, for authorisation, to someone else in your absence.

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 titled "My task redirections" with a sub-header "My task redirection details New" and a "MENU" dropdown. The form contains the following fields:

- Start date: 01/06/2021 (with a calendar icon)
- End date: 08/06/2021 (with a calendar icon)
- Process type: Redirect all (with a dropdown arrow)
- Redirect to: CBEST (with a magnifying glass icon)

A green "SAVE" button is located below the form.