

iTrent Self Service User Guide



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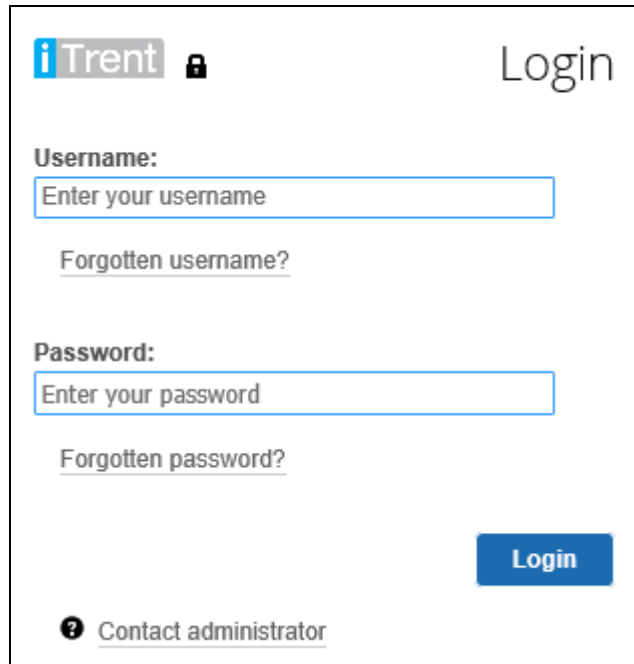
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1.1 Introduction

iTrent Self Service can be accessed over the internet using the URL https://lbealte.webitrent.com/lbealte_ess/ess/.

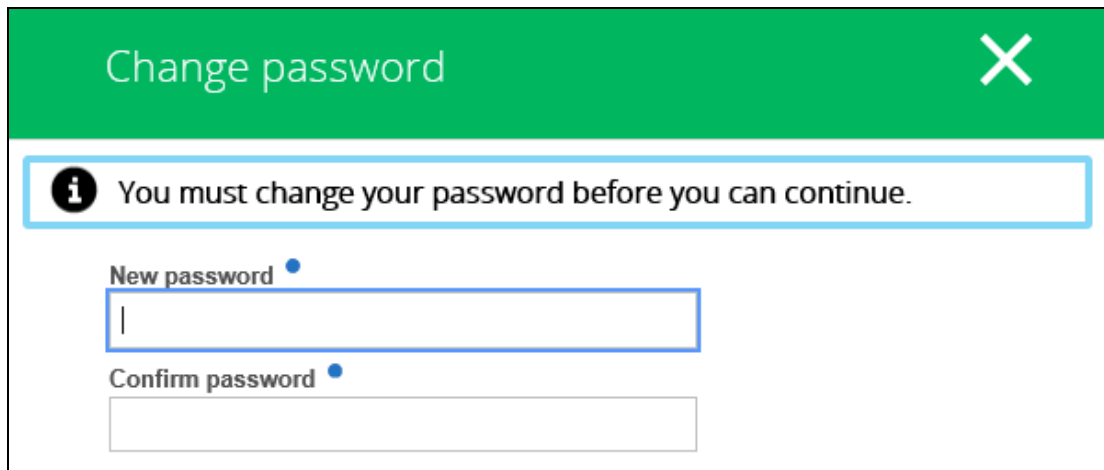
Enter your username and password and click Login.



The image shows the iTrent login interface. At the top left is the iTrent logo with a lock icon, and at the top right is the word "Login". Below the logo is a "Username:" label followed by a text input field containing the placeholder "Enter your username". Underneath the input field is a link for "Forgotten username?". Below that is a "Password:" label followed by a text input field containing the placeholder "Enter your password". Underneath the input field is a link for "Forgotten password?". At the bottom right is a blue "Login" button. At the bottom left is a link for "Contact administrator" with a question mark icon.

When logging in for the first time a change password prompt will appear. Enter a new password and confirm it to proceed.

Passwords must be a minimum of 8 characters, alpha numeric and contain an upper case letter.

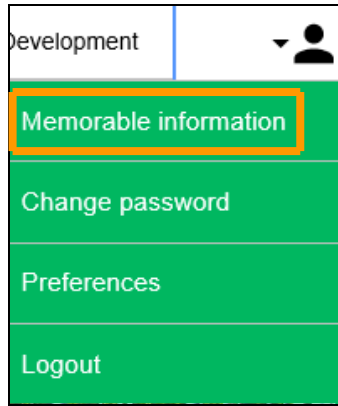


The image shows a "Change password" dialog box with a green header and a white body. The header contains the text "Change password" and a close button (X). The body contains an information icon (i) followed by the message "You must change your password before you can continue." Below the message are two text input fields: "New password" and "Confirm password".

1.2 Memorable Information

Memorable information should be set up to assist when a password has been forgotten.

Click the arrow by the person icon in the top right hand corner and select Memorable information.



Enter a memorable information prompt and enter the answer twice in the next two fields then Save.

Memorable information details ✕

i Memorable information has to contain between 6 and 25 characters, it cannot contain spaces nor be the same as your prompt, password or user name. Only a-z characters (uppercase or lowercase) and numbers are allowed on this page.

Memorable information prompt •

Memorable information •

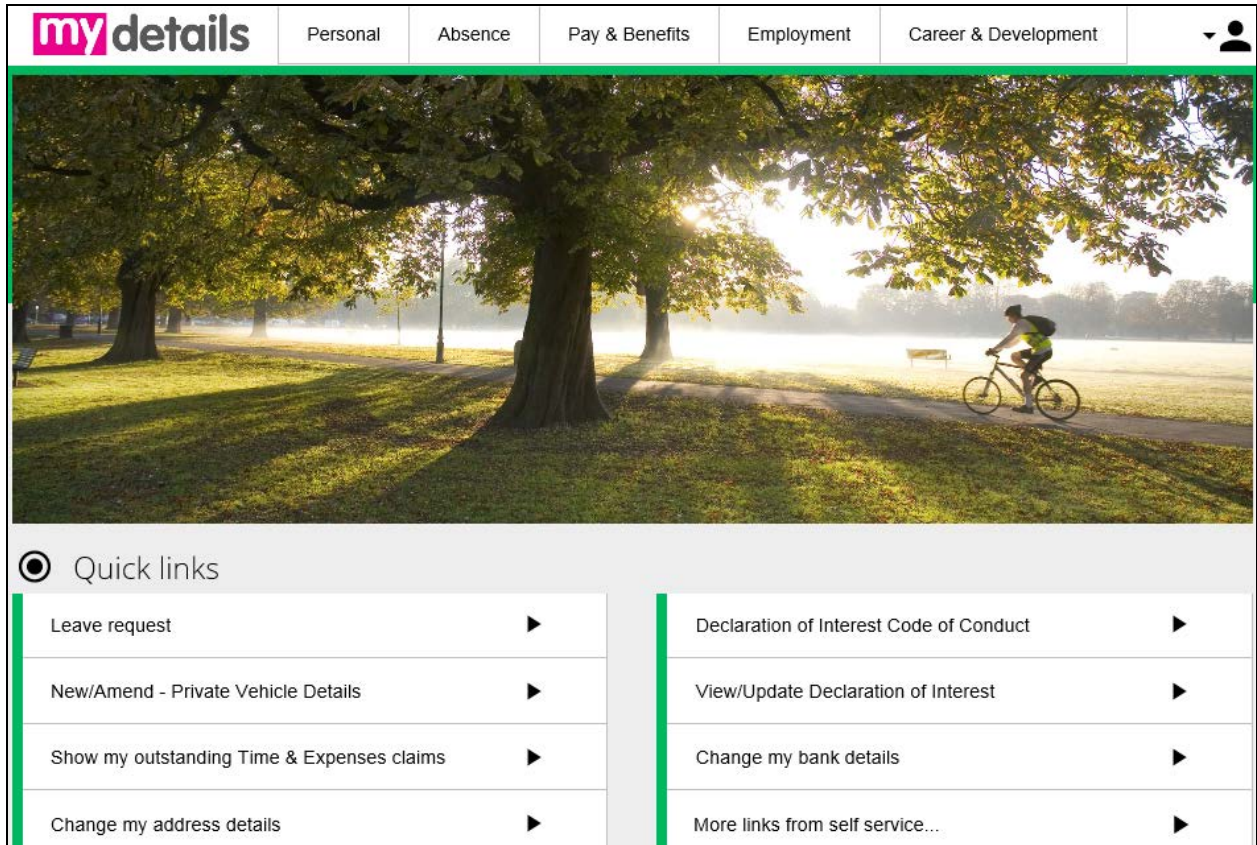
Confirm memorable information •

Examples of memorable information:

- First pet's name
- Name of Junior School
- Mother's maiden name

2. Homepage

There are quick links on the Home Page which will open pages without navigation.



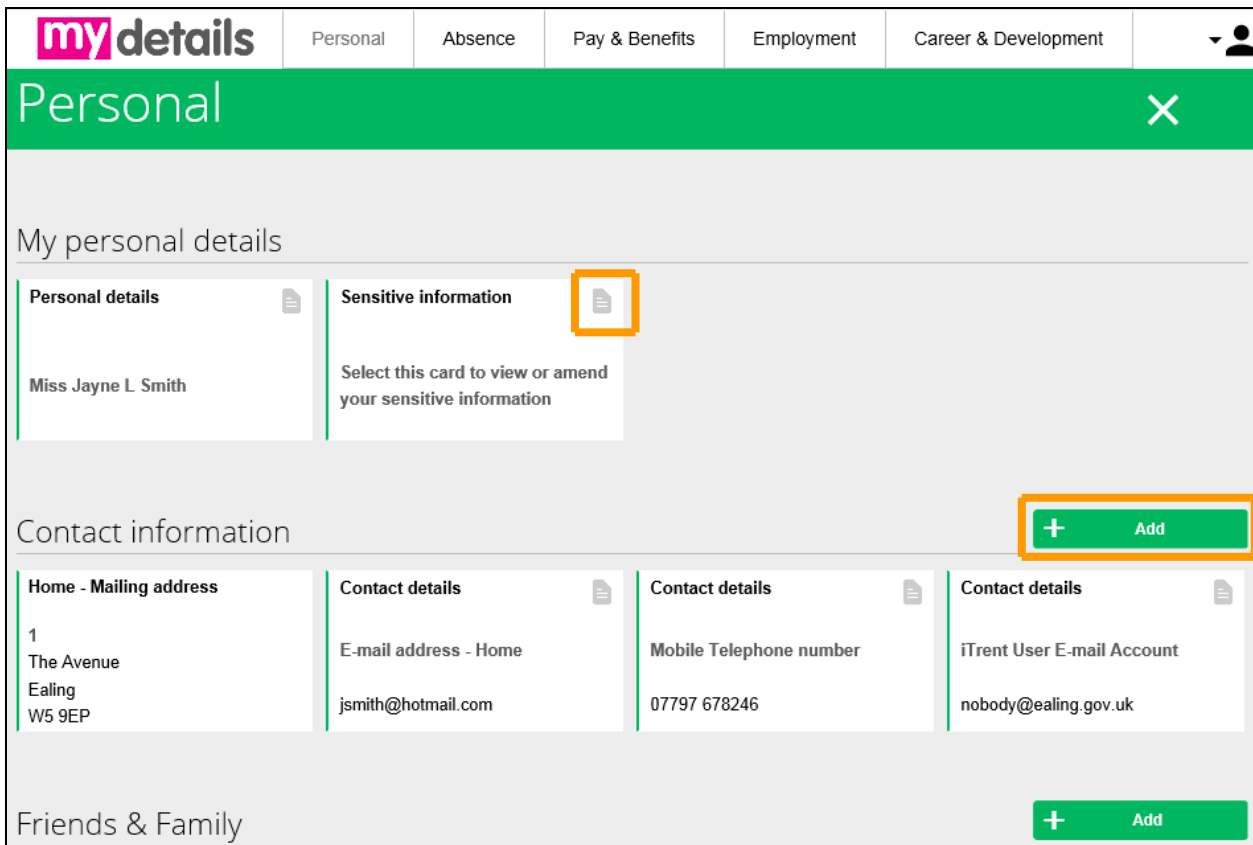
The tabs across the top of the screen open into “at a glance” information resulting in less clicks to gain access to your personal information.

An example of an “at a glance” page on the Personal tab is shown below.

When the small grey icon at the top right of each card is visible, the details in that card can be amended.

To add new details click on the green Add icon.





The tabs containing the following information:

Personal – Personal details, Sensitive Information, Addresses, Contacts, and Emergency Contacts, Bank details and Private vehicle details.

Absence – Holidays, Sickness and Other absences

Pay & Benefits – Payslips, P60, Time & Expenses and Saved journeys.

Employment – Current jobs, previous jobs.

Career & Development – Learning activities, Qualifications and Memberships.

To navigate, click on the relevant tab, to go back close the open screen using the cross in the top right hand corner or click on the iTrent icon in the top left hand corner.



3. Personal

Sensitive Information - can be amended or added to. Change the details by selecting the relevant field from the drop down list, then clicking the save button.

Contact information is a view of personal current contact details.

To add a new address, select Add address. Do not overwrite existing addresses.

Contact information			
Home - Mailing address	Contact details	Contact details	Add address
1 The Avenue Ealing W5 9EP	E-mail address - Home jsmith@hotmail.com	Mobile Telephone number 07797 678246	Add contact details
			iTrent User E-mail Account nobody@ealing.gov.uk

Contact details can be amended or added.

On commencing employment it is essential to enter an iTrent User Email Account which is your personal borough email address.

Contact information			
Home - Mailing address	Contact details	Contact details	Add address
1 The Avenue Ealing W5 9EP	E-mail address - Home jsmith@hotmail.com	Mobile Telephone number 07797 678246	Add contact details
			iTrent User E-mail Account nobody@ealing.gov.uk

Friends and Family

Emergency contacts or Next of kin can be amended by selecting the relevant contact box, making the changes and save.

Emergency contacts can also be added by selecting +Add emergency contact button

Friends & Family		
Emergency contact	Emergency contact	Next of kin
Helen Sister Primary 07777 456789	Ray Rich Friend Primary 07881 913 986	Mary Smith Mother
		+ Add

Bank details

Bank details can be replaced but take effect immediately. **Please only change bank details during the first week of the month as this may affect salary payment in to the account.**

Vehicle details

When a personal vehicle is used for business the car details must be held against any claim. Enter a new vehicle if relevant and save.

If the make and model is not listed please contact itrentsupportteam@ealing.gov.uk.

4. Absence

4.1 Holidays – Only employees who work all year round and where the school has requested this functionality will have access to holiday and other bookings.

Where applicable Holiday requests are booked through self service and authorised by the school administrator or headteacher.

The number of hours available is the balance for the remaining leave year. This takes in to account future booked holidays, bank holidays and Ealing days (if relevant).

Holiday periods booked are listed in date order and calculated in hours from an individual's working pattern.

Holidays - 59.5 hours available						
Start date	End date	Duration	Type	Position	Authorisation	
27 Sep 2016	28 Sep 2016	14.0	Holiday	iTrent System Officer	Not applicable	^
25 Jul 2016	26 Jul 2016	14.0	Holiday	iTrent System Officer	Authorised	
13 Jun 2016	14 Jun 2016	14.0	Holiday	iTrent System Officer	Not applicable	
1 Jun 2016	9 Jun 2016	49.0	Holiday	iTrent System Officer	Not applicable	v

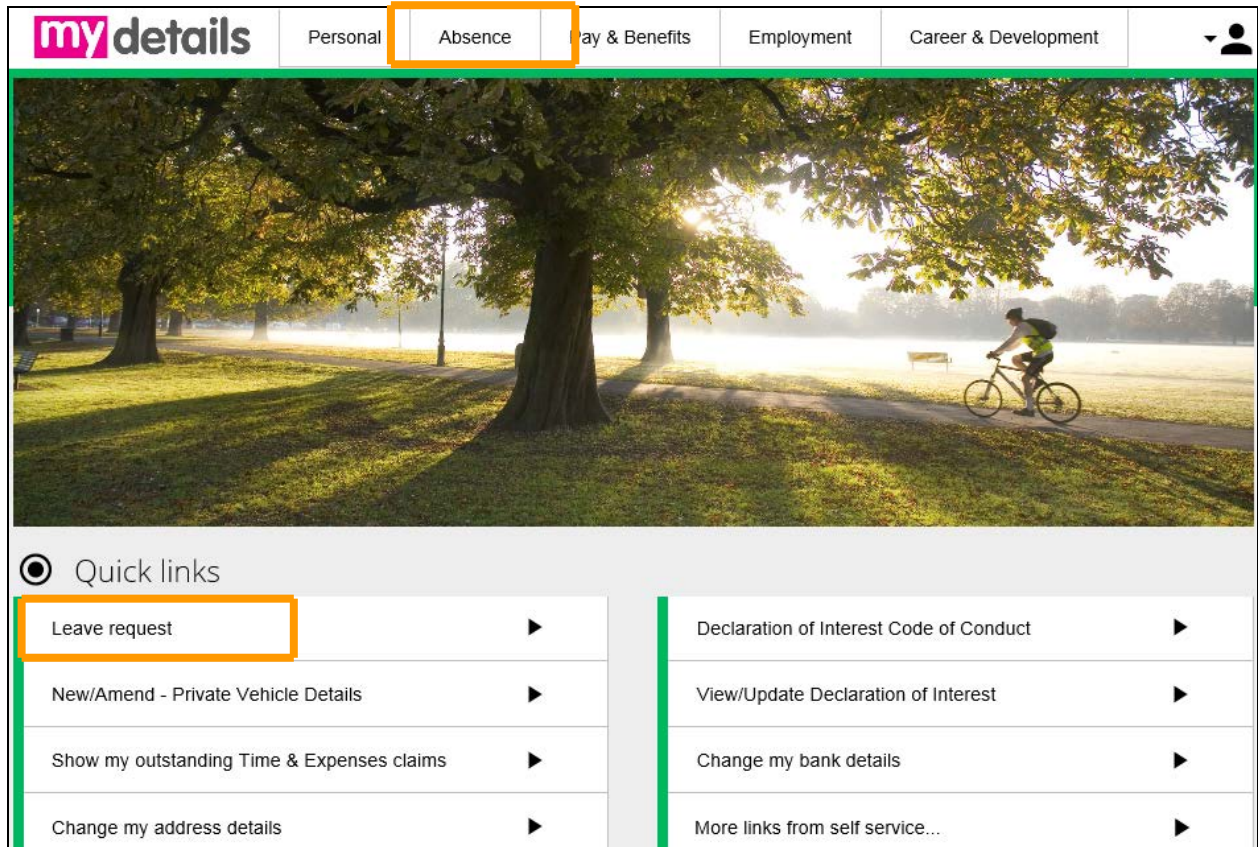
Holiday balances show the full entitlement for the year, hours taken, scheduled and the remaining balance

Holiday Balances				
i The balance takes account of all recorded holidays including any awaiting authorisation				
iTrent System Officer - Corp Annual Leave				
Holiday Period	Entitlement	Taken	Scheduled	Balance
12 Oct 2015 - 30 Sep 2016 (Part)	287 hours	192.5 hours	35 hours	59.5 hours
1 Oct 2016 - 30 Sep 2017	287 hours	0 hours	77 hours	210 hours

[Book a holiday](#) [Cancel](#)

4.2 Requesting Holidays & Other Dates

To enter a leave request click either the Absence Tab for Holidays and Other, or the Leave request link for holidays.

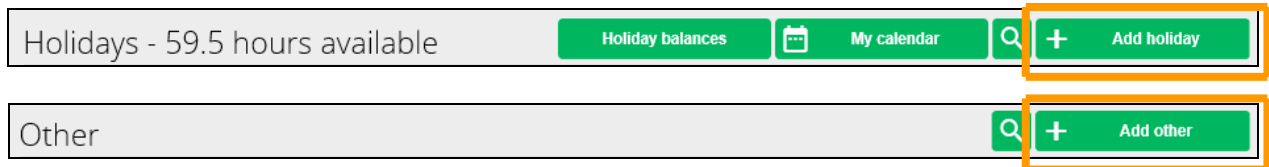


mydetails Personal **Absence** Pay & Benefits Employment Career & Development

Quick links

- Leave request
- New/Amend - Private Vehicle Details
- Show my outstanding Time & Expenses claims
- Change my address details
- Declaration of Interest Code of Conduct
- View/Update Declaration of Interest
- Change my bank details
- More links from self service...

On the Absence tab select either of the following:



Holidays - 59.5 hours available [Holiday balances](#) [My calendar](#) [+](#) [Add holiday](#)

Other [+](#) [Add other](#)

For Holiday details select Absence type 'Holiday' from the drop down list.

✕
Holiday details

i Your holiday request will be submitted to your manager for authorisation. Your manager will need to adjust your holiday entitlement through People Manager if you wish to carry forward, anticipate or bank leave. When booking holiday please make sure that you highlight the position that you are booking leave against. If you get a message saying that there is no holiday scheme, you haven't highlighted a position.

Absence type •

Please choose ▼

Holiday period •

Please choose ▼

Notes

Save
Cancel

For Holiday period select either **Part day**, **Full day** or **More than one day**.

For **Part day** select Morning or Afternoon, enter the date by using the calendar.

Start date (dd/mm/yyyy) •

📅

Enter free text notes if necessary.

For **Full day** select Full day and enter the date by using the calendar.

For **More than one day** enter the start date and select whether it is a full day or part day. Then select the end date and full or part day.

Once all the details are entered then Save.

The request will show on the absence tab as 'Awaiting authorisation'.

Holidays - 🌞 - 59.5 hours available						
Start date	End date	Duration	Type	Position	Authorisation	
27 Sep 2016	28 Sep 2016	14.0	Holiday	iTrent System Officer	Not applicable	⬆
25 Jul 2016	26 Jul 2016	14.0	Holiday	iTrent System Officer	Authorised	⬆
12 Jul 2016	12 Jul 2016	7.0	Holiday	iTrent System Officer	Awaiting authorisation	⬆

For Other absence details select Absence type from the drop down list.

For Holiday period select Part **day**, **Full day** or **More than one day** and repeat the process above for Holiday requests.

Absence requests that are future dated can be amended or deleted by the employee even if authorised.

Go to the absence details and amend and save or cancel.

Absence in the past, but not taken, needs to be amended or deleted by the manager.

4.3 Sickness

Sickness dates are entered by a school administrator and these can be viewed but not amended.

Sickness						
Start date	End date	Type	Position	Authorisation	Attachment	
4 Jul 2016	5 Jul 2016	Sickness	iTrent System Officer	Not applicable		
13 Jun 2016	16 Jun 2016	Sickness	iTrent System Officer	Not applicable		
4 Apr 2016	4 Apr 2016	Sickness	iTrent System Officer	Not applicable		
16 Feb 2016	18 Feb 2016	Sickness	iTrent System Officer	Not applicable		

5. Pay & Benefits

Payslips

Select a payslip to view further details, these open in pdf format and can then be saved and printed if needed. Use the search icon to search for older payslips that do not appear in the list.

my details
Personal
Absence
Pay & Benefits
Employment
Career & Development

Pay & Benefits
✕

Payslips

Pay date	Tax period	Net pay
24 Jun 2016	3	2,227.10
26 May 2016	2	2,170.00
26 Apr 2016	1	2,170.20
24 Mar 2016	12	2,199.05

P60

P60

2015/2016

6th April 2015 - 5th April 2016 (MGEN)

P60

Click on the card to view a P60s, these open in pdf format and can then be saved and printed if needed. Use the search icon to search for older P60s that do not appear in the list.

Time & Expenses and Saved journeys – please refer to the LBE iTrent Claiming Time & Expenses Guide.

6. Employment

All current and previous jobs (since 2011 and the inception of iTrent) can be viewed by selecting the Employment tab. Select a job to view specific details.

Current job details

Job details

Department iTrent Support Team	Position reference 15620
Position name iTrent System Officer	Start date 12/10/2015
Payroll reference 0047529	Contractual hours 35.00
Work pattern 35:00 hrs Full Time M-F	

Manager

Reporting manager and job title
Vacant - Dummy Manager


If any of these details are incorrect please contact your manager/school administrator.

7. Career & Development

Learning activities

Learning activities undertaken via eLearning are downloaded monthly into the Learning Activities record.

To view the records change the drop down from Current to All

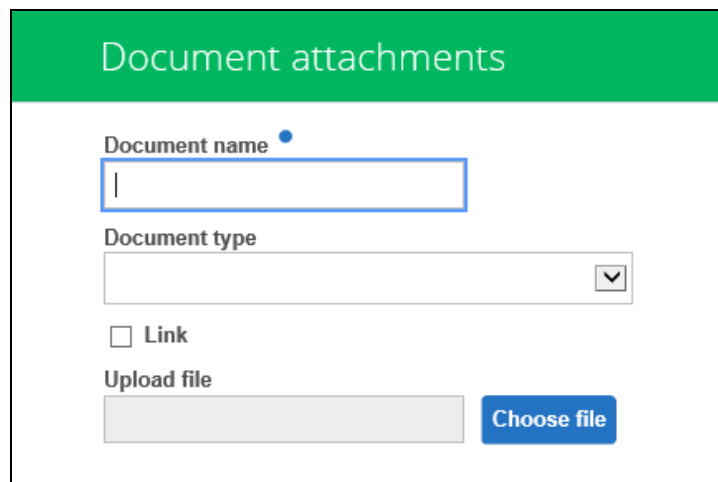


Learning activities Current + Add personal learning

Any learning undertaken outside of working hours, separate from Ealing learning, can be added via the green **Add Personal Learning** icon located under Learning Activities, **Add Qualification** under the Qualifications heading, or **Add Membership** under the Memberships heading.

The green paperclip logo  gives the opportunity to attach scanned personal certificates.

Click the paperclip, Add and enter details, browse files and save.



Document attachments

Document name

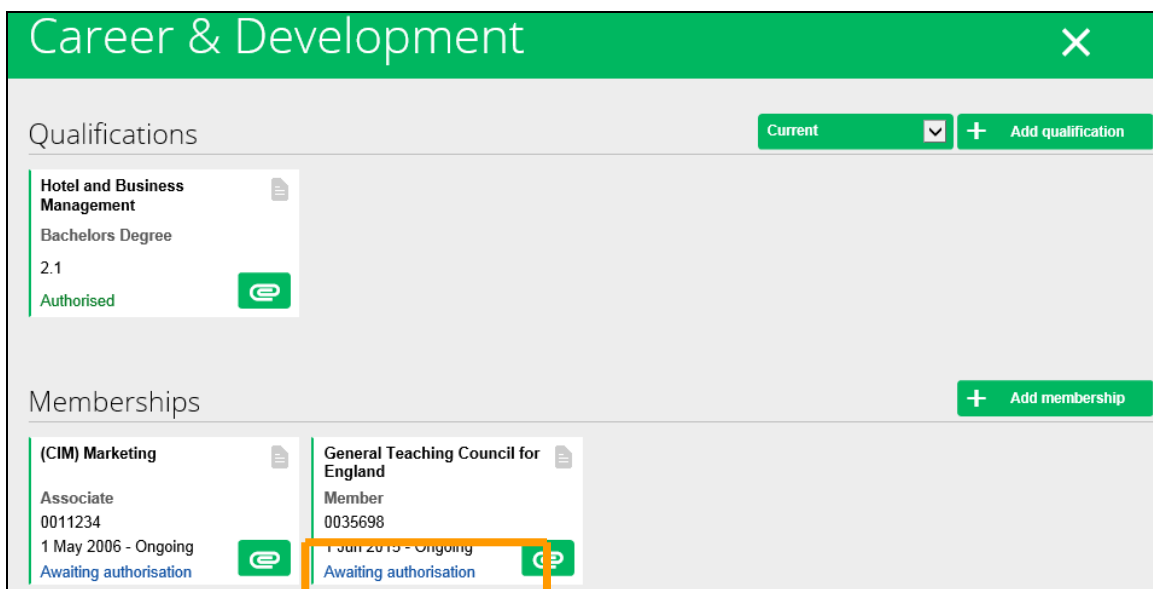
Document type

Link

Upload file Choose file


Qualifications and Memberships

These can be added to be held on record. When a new qualification or membership is added a task is sent to the manager to authorise the details. The cards below show 'Awaiting authorisation'.





Career & Development

Qualifications Current + Add qualification

Hotel and Business Management
Bachelors Degree
2.1
Authorised 

Memberships + Add membership

(CIM) Marketing 
Associate
0011234
1 May 2006 - Ongoing
Awaiting authorisation

General Teaching Council for England 
Member
0035698
1 Jun 2015 - Ongoing
Awaiting authorisation

8. Help and Support

For any queries please email itrentsupportteam@ealing.gov.uk

9. End the session

To exit self service click on the head and shoulder outline in the top, right hand corner of the screen and select Logout.

