

Absence Administrator User Guide

University of
HUDDERSFIELD



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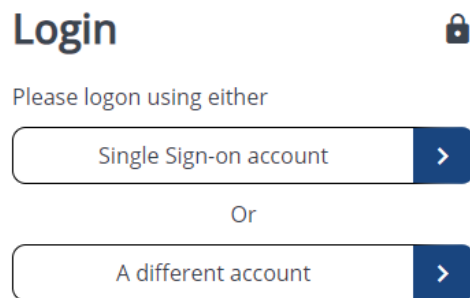
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Logging In

The HR system (iTrent) can be accessed by using the following web address
<https://itrent.hud.ac.uk/> .

iTrent uses Single Sign On (SSO) which means your University login credentials will be passed through and you will be signed into the system automatically.

If you are prompted with Login options like below, please choose “Single Sign-on account”.



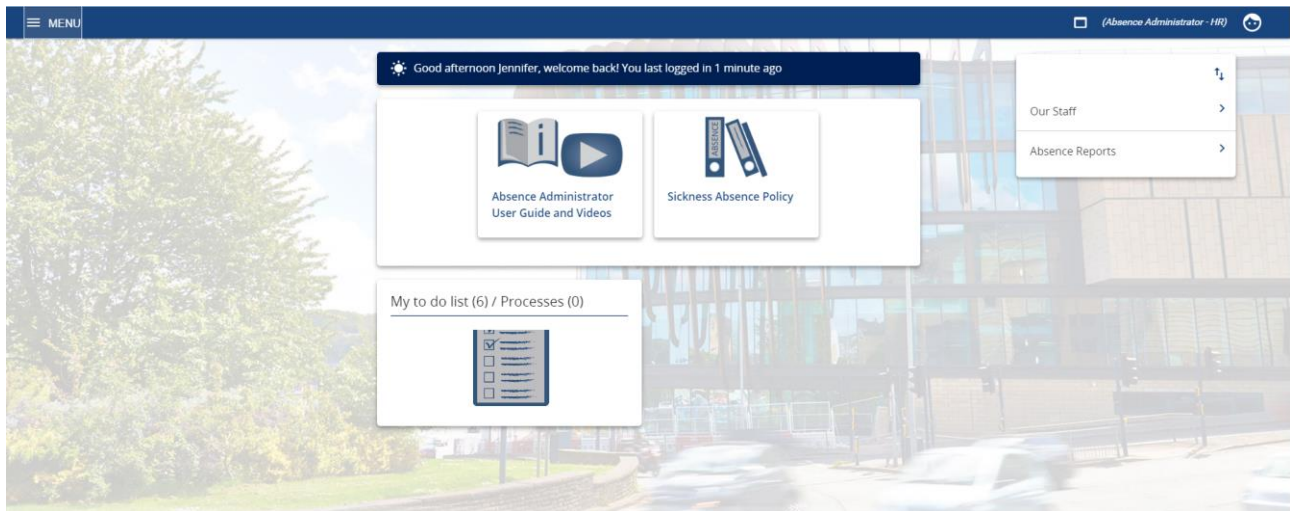
The screenshot shows a login interface with the title "Login" and a lock icon. Below the title, it says "Please logon using either". There are two buttons: "Single Sign-on account" and "A different account". Both buttons have a right-pointing arrow. The "Single Sign-on account" button is highlighted with a blue background.

If you are experiencing any difficulties logging into iTrent and would like assistance please contact myhr@hud.ac.uk.

Note: iTrent is only available when working on campus, or when being accessed remotely via UniDesktop or the VPN.

Homepage

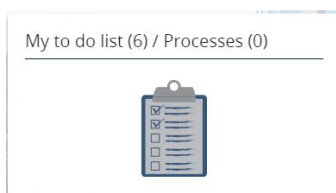
Once you logged into iTrent as an Absence Administrator, you will be presented with the Homepage as shown below.



While using iTrent, if you navigate away from the homepage, you can always get back to it by clicking on the iTrent button in the top left hand side of the screen as shown below.



The following options are along the bottom of the homepage:



The *Your to do* list is not currently utilised for Absence Administrators in this release



The *Absence Administrator User Guide and Videos* option links to the User guide for Absence Administrators on the University's webpage

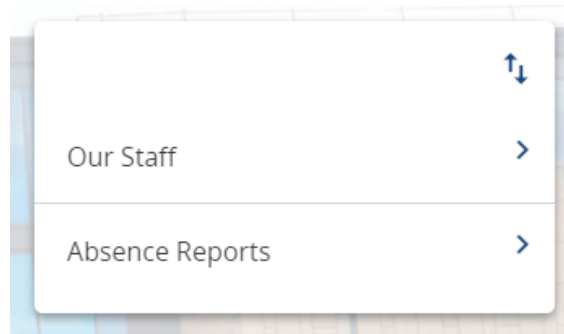


Sickness Absence Policy

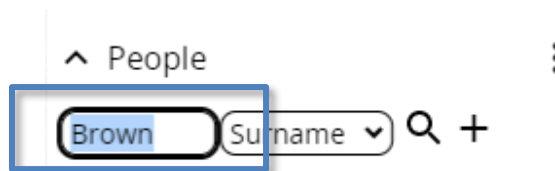
The Sickness Absence Policy option provides a quick access link to the Management of sickness absence policy document.

Searching for an Employee

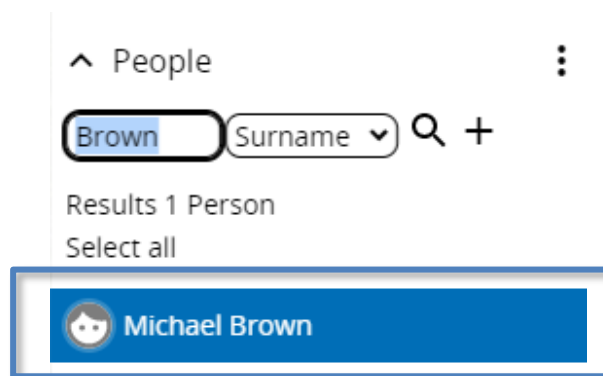
To search for an employee within your School/Service, click on the “Our Staff” button on the homepage.



A search option will appear on the left hand side of the screen. Enter the surname of the employee you are searching for in this field and press return.



All members of staff with that surname will be listed below the search field.



Select the correct employee from the search results, and a summary page for that person will open.

Michael Brown
🔄

Personal

Known as Michael

36396 (Personal ref.)

Employment

Administration Assistant

Calendar 1 Sep 2022 - 31 Aug 2023

👁️ VIEW FULL CALENDAR

04 - 17 November 2022

04

05

06

07

08

09

10

11

12

13

14

15

16

17

Holidays remaining
(as of last calculation)

LINKS

Sickness Absences

> Holidays/Flexi Leave

> Working Pattern

Absence History

Add New Absence

Absence Calendar

You are able to view the absence calendar for any employees within your School/Service by using the absence calendar. To do this, search for the correct member of staff by following the steps outlined in the [“Searching for an Employee”](#) section and open their summary page.

In the “Calendar” section of their summary page, click on “View full calendar”.

Calendar
1 Sep 2022 - 31 Aug 2023

👁️ VIEW FULL CALENDAR

04 - 17 November 2022

04

05

06

07

08

09

10

11

12

13

14

15

16

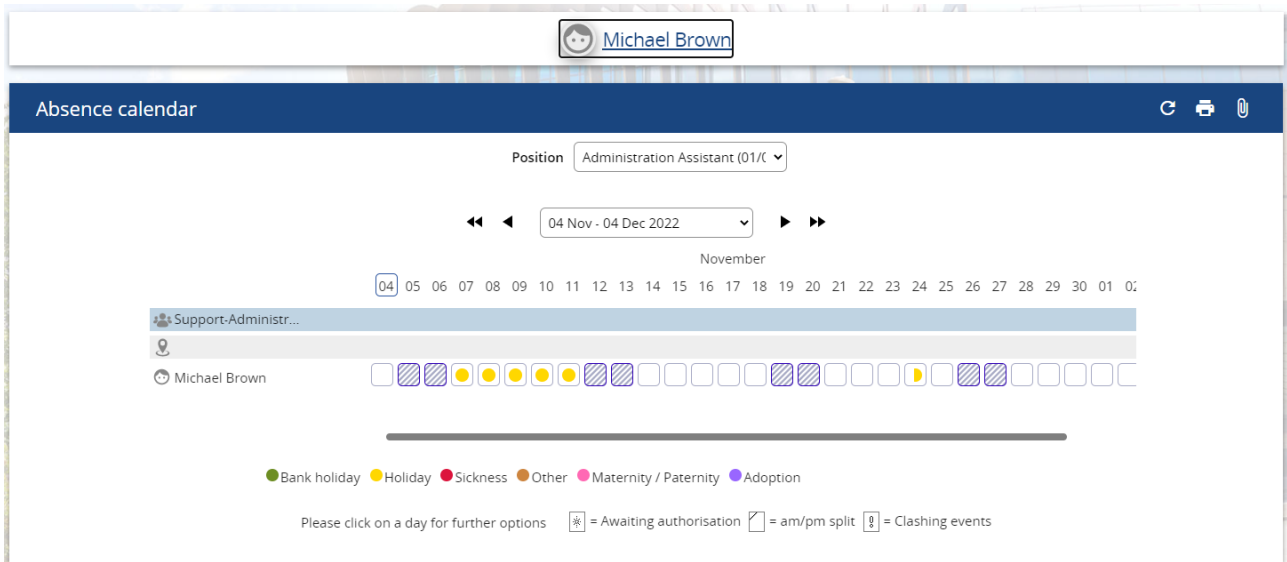
17

Holidays remaining
(as of last calculation)

This will show the next 14 days and any absence along with the absence type during that time:

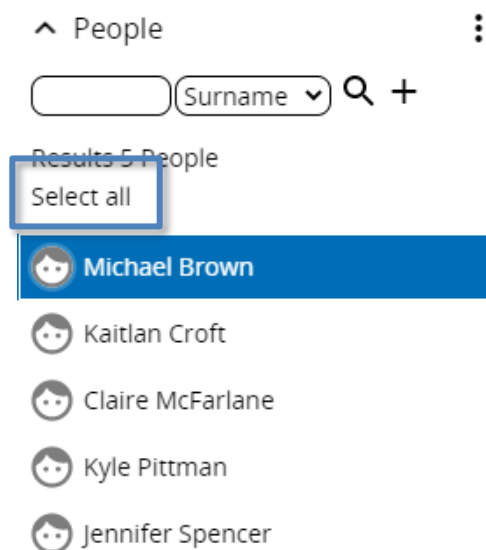
March 2024

7 | Page

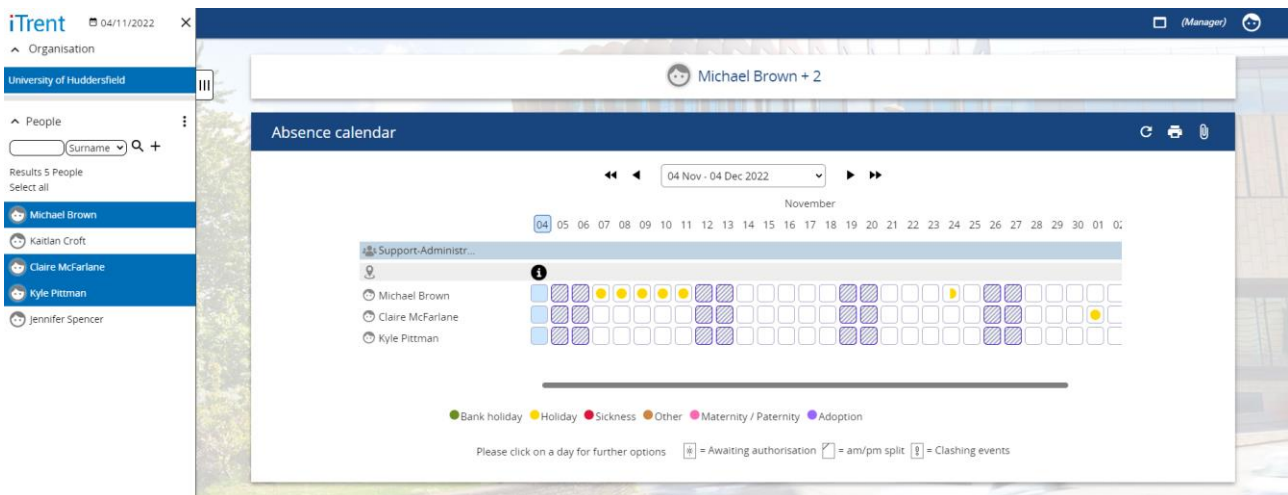


Viewing Multiple Employees in the Absence Calendar

If you would like to see multiple employee's availability within the absence calendar, first navigate to an employee's absence calendar using the steps above and then perform a blank search when searching for an employee. **Note:** if you are the absence administrator for a large amount of people then this search may take a while.



If you would like to view all employee's availability, click on the "Select all" button. If you would like to view specific employees, hold Ctrl and click on each employee that you would like to view the absence calendar for. The absence calendar will then reload with these employee's absence information allowing you to see their availability in a single location.

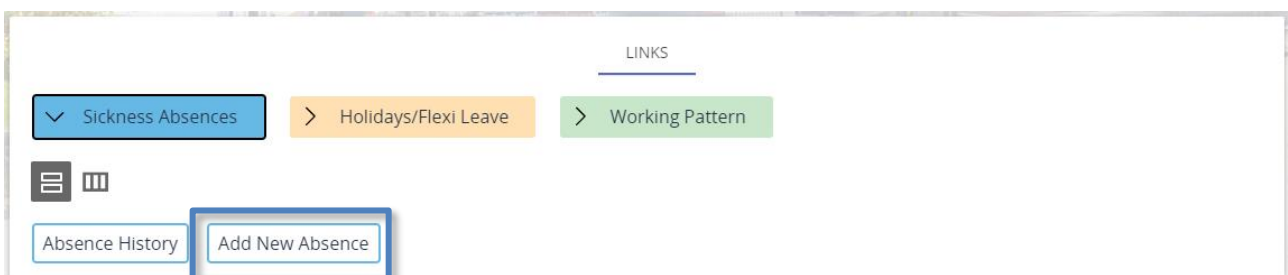


Sickness Absence

Entering a New Sickness Absence

Using iTrent, you are able to create a new absence record for a member of staff from within your School Service. To do this, search for the correct member of staff by following the steps outlined in the [“Searching for an Employee”](#) section and open their summary page.

In the links section of their summary page, you will see an option to *Add New Absence*.



Click on this option and you will be taken to a new Sickness absence details page. This page is split into four sections; *Sickness period*, *Absence start*, *Absence end* and *Absence*.

Michael Brown

Sickness absence details New

Sickness period

Sickness period * More than one day

Absence start

Absence start date *

Absence start type Full day

Absence end

Absence end date

Absence end type Full day

Absence

Absence type * Set as default

Absence reason <None>

Save

In the *Sickness period* section ensure that the option for “More than one day” is selected (This should already be selected by default).

Sickness period

Sickness period * More than one day

The only field which you should complete in the *Absence start* section is *Absence start date*, which should be the first day of the employee’s absence. The *Absence start type* field should be automatically set to “Full day”.

Absence start

Absence start date * 04/11/2022

Absence start type Full day

The *Absence end* section should look the same as the example below. The *Absence end type* should be automatically set to ‘Full day’. Do not add an *Absence end date* as it is the employee’s responsibility to update this via MyHR when they return to work.

Absence end

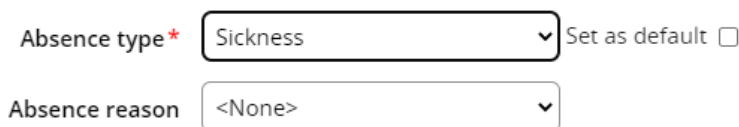
Absence end date

Absence end type Full day

If when you save the absence record, a date appears in the *Absence end date* field, delete this and save the page again.

In the *Absence* section, select “Sickness” as the *Absence type*. Do not add a value in the *Absence reason* field as it is the responsibility of the employee to do this via MyHR when they return to work.

Absence



Absence type * Sickness Set as default

Absence reason <None>

Click on the save button and you should see the new absence record you created appear in the *Sickness Absence List* on the left hand side of the screen.

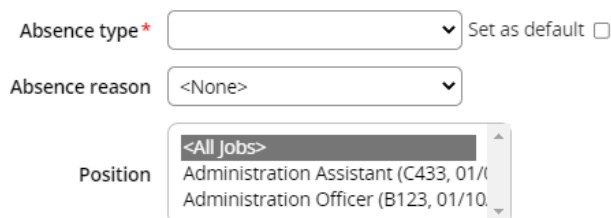
Note: Once you have saved a record, you will not be able to delete it. If you need to delete an absence which you have entered incorrectly, please contact the MyHR team via email myhr@hud.ac.uk.

Entering a Sickness Absence for Multiple Positions

If the employee holds more than one position within your school or service, you will need to select the position/s that the sickness absence should be recorded against. This should be done in the *Absence* section of the *New absence details* page.

Enter the new Sickness absence record as outlined in the previous section of this guide, when you get to the *Absence* section of the page you should see the *absence type* and *absence reason* as normal, but you should also see the *Position* field as below.

Absence



Absence type * Set as default

Absence reason <None>

Position

- <All Jobs>
- Administration Assistant (C433, 01/10)
- Administration Officer (B123, 01/10)

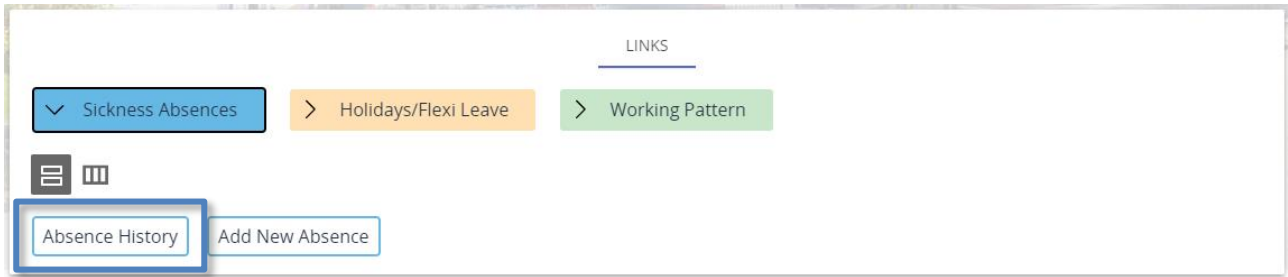
This will show all current jobs the employee has in iTrent as well as any future dated jobs which they may have.

You are able to select multiple jobs by keeping hold of the Ctrl button whilst clicking on each job the absence applies to. The *Position* field only shows three lines of information and so you may have to scroll down the list to view all available options.

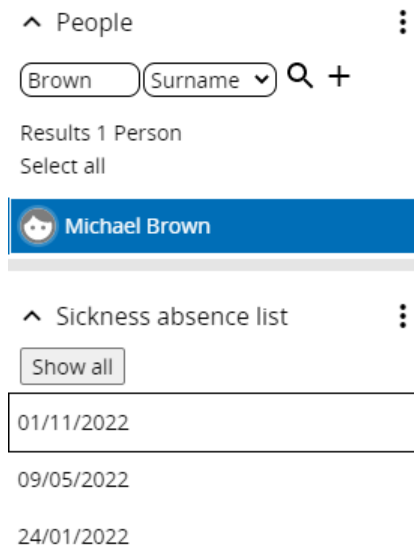
Viewing an Employee’s Sickness Absence History

You can view the sickness absence history for a member of staff within your School/Service. To do this, search for the correct employee by following the steps in the previous section.

On the employee’s summary page there is an option to view *Absence History* in the Links section.



This will list all sickness absence records for that employee on the left hand side of the screen listed by the absence start date starting with the most recent.



Selecting a sickness absence record from this list will display the sickness absence record.

The screenshot shows the 'Sickness absence details' form for Michael Brown. The form is divided into several sections:

- Sickness period:** Sickness period* (More than one day)
- Absence start:** Absence start date* (09/05/2022), Absence start type (Full day)
- Absence end:** Absence end date (09/05/2022), Absence end type (Full day)
- Absence:** Absence type* (Sickness), Absence reason (Cold)

At the bottom of the form, there are two buttons: 'Save' and 'New'.

The only fields you are able to update is the *Absence start date* and the *Absence end date* and *Absence reason*. This should only be done if this was initially entered incorrectly. If an employee needs to change their absence reason or end date then they must do this via MyHR. If you change a *Start date* long after the absence occurred this may trigger an audit query from the MyHR team.

Note: The sickness absence list will only display absence records from within the last 12 months. If you are looking for an absence record from before this, you can do so by clicking on the *Show All* button.

Note: you are unable to make any amendments to your own record within iTrent. If your start date is incorrect and needs changing you should inform your Line Manager who will be able to do this for you.

Sickness Absence categories

The University uses UCEA absence categories and each period of absence must be classified as one of these groups. Below is a table of all UCEA absence categories which also provides examples of what should and should not be included in each category:

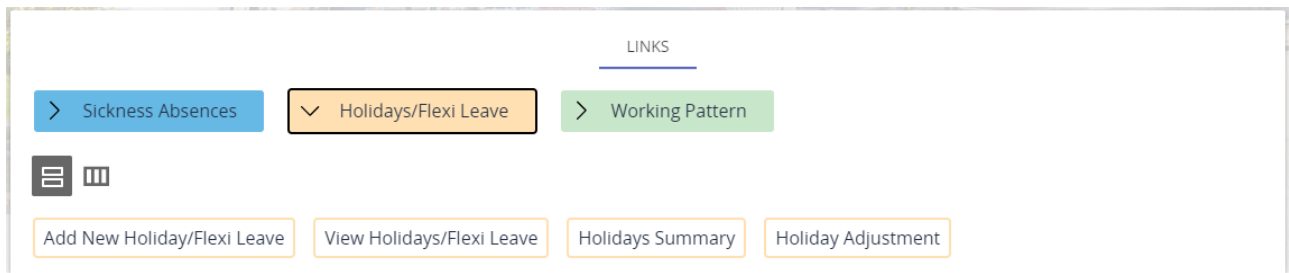
Category	Examples to Include	Don't include
Cancer (CNCR)	Cancer and cancer treatments (Chemotherapy, radiotherapy), lymphoma, biopsies, mastectomy, breast cancer	
Cold (COLD)	Cold, cough, flu, fever, virus, temperature, general aches and pains, hay fever	Headaches
Diabetes, Endocrine and Glandular (DEGP)	Diabetes, Glandular fever, swollen glands, thyroid problems	
Eyes, Ears, Nose, Throat and Dental (ENTD)	Eye problems, conjunctivitis, glaucoma, ear problems, earache, labyrinthitis, tinnitus, nosebleed, sinusitis, sore throat, laryngitis, toothache, tooth abscess, other oral problems, dental treatment	Surgery or operations e.g. tonsillectomy, tooth extractions
Genitourinary and Gynaecological (GNIT)	Cystitis, bladder infection, kidney problems, menstrual pain, urinary tract infections	Pregnancy related problems
Heart, Circulatory and Blood Disorders (HEBL)	Heart attack, angina, stroke, seizure, irregular heartbeat, blood disorders, blood pressure, blood clots, DVT, anaemia	
Infections and Infectious Diseases (INFC)	Measles, mumps, chicken pox, shingles, legionnaires, foot and mouth	Throat infections
Injury, Burns and Poisoning (INBP)	Burns, frostbite, sunburn, wasp sting, industrial injury	
Menopause or Perimenopausal Symptoms (MENP)	Menstrual changes specifically heavy periods especially flooding	

Mental Health (MNTL)	Stress, fatigue, debility, anxiety, depression, alcohol or drug dependency, bereavement, exhaustion, nervous debility, panic attacks	
Migraine and Headache (MIGR)	Headaches, migraine, dizzy spells, neuralgia, sunstroke, epilepsy	
Musculoskeletal (MUSC)	Back pain, neck pain, broken limbs, sprains, arthritis, sciatica, whiplash, muscle tears, bruises	
Operations, Surgical Procedures (OPER)	Hospital appointments, organ donation, any operation or surgery, investigations, tests, tooth extraction	Dental appointments
Other, Unknown (OTUN)	Other reasons not classified elsewhere, only rarely used	
Pregnancy Related (PREG)	Pregnancy related problems, miscarriage	
Respiratory (RESP)	Asthma, breathing problems, bronchitis, chest infection, Pneumonia, Pleurisy, chest pains, respiratory tract infection, tracheitis	Ears, nose, throat, cold flu
Skin (SKIN)	Eczema, rash, psoriasis, alopecia, cellulitis, allergies	Burns, hay fever
Stomach, digestive and gastro-intestinal (STMC)	Vomiting, diarrhoea, nausea, upset stomach, indigestion, gastritis, ulcers, norovirus, IBS	

Annual Leave

Entering a new period of Annual Leave

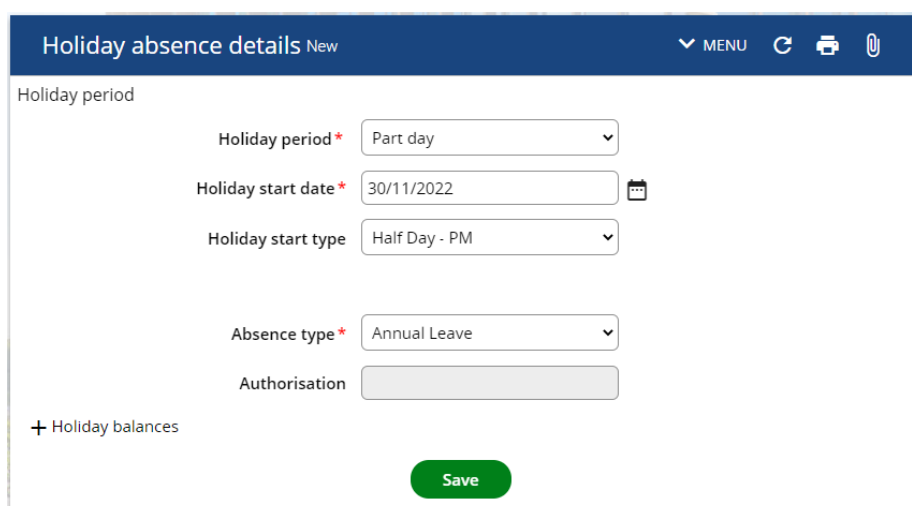
You are able to use iTrent to add a new period of annual leave for a member of Staff in your School/Service. To do this, click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the [Searching for an Employee](#) section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays/Flexi Leave” button and the holidays options will expand.



Click on the “Add New Holiday/Flexi Leave” button and a blank *Holiday absence details* page will open.

When entering a period of annual leave for a part day, select Part day as the *Holiday period* and you will be presented with options for the *Holiday start date* and *Holiday start type*. Enter the date in to the *Holiday start date* and then select either Half Day – AM or Half Day – PM from the *Holiday start type* field. Select Annual Leave from the *Absence type* drop down and then click on the Save button.

Please note: If the employee works on a part time basis and would normally only work in the morning or afternoon, you should select Full day as the *Holiday period* when entering a new period of annual leave otherwise the number of hours deducted from their annual leave entitlement will be incorrect.

A screenshot of the 'Holiday absence details New' form. The form has a dark blue header with the title and a 'MENU' button. Below the header, there are several fields: 'Holiday period' (dropdown menu set to 'Part day'), 'Holiday start date' (text input with a calendar icon, containing '30/11/2022'), 'Holiday start type' (dropdown menu set to 'Half Day - PM'), 'Absence type' (dropdown menu set to 'Annual Leave'), and 'Authorisation' (text input). At the bottom left, there is a '+ Holiday balances' link. At the bottom center, there is a green 'Save' button.

When entering a period of annual leave for a Full day, Select Full day from the *Holiday period* dropdown. Enter the holiday date in to the *Holiday start date* and select Annual Leave from the *Absence Type* dropdown and then click on the Save button.

Holiday absence details New ▼ MENU ↻ 🖨 📎

Holiday period

Holiday period *

Holiday start date * 📅

Absence type *

Authorisation

+ Holiday balances

Save

When entering a period of annual leave for more than one day, select More than one day as the *Holiday period*. Enter the first day of annual leave in to the *Start date* and then select either Full day or Half Day – PM as the *Holiday start type*, then enter the last day of annual leave in the *End date* field and select either Full day of Half Day – AM as the *Holiday end type*. Select Annual Leave as the *Absence type* and then click on Save.

Holiday absence details New ▼ MENU ↻ 🖨 📎

Holiday period

Holiday period *

Holiday start date * 📅

Holiday start type

Holiday end date * 📅

Holiday end type

Absence type *

Authorisation

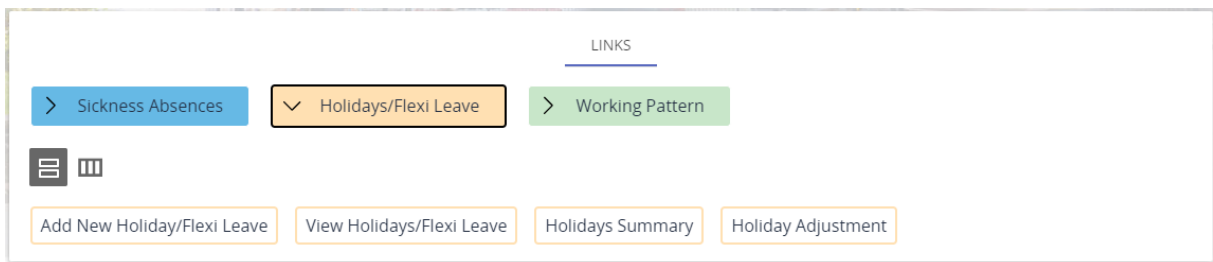
+ Holiday balances

Save

Reviewing Previous Annual Leave

Using iTrent, you are able to review previously taken annual leave, upcoming annual leave and remaining annual leave entitlement for the annual leave period which runs from the 1st September to the 31st August of each year.

To do this, click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the [Searching for an Employee](#) section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays” button and the holidays options will expand.



Click on the “Holidays Summary” button and this will open the Holiday entitlement summary page.

[MENU](#)
↻
🖨
📎

Holiday entitlement summary

Employment details

Position Administration Assistant

Period details

Holiday period dates 01/09/2022 - 31/08/2023

Length of service at relevant date 2 year(s) 8 month(s) 0 day(s)

Scheme name Annual Leave Support

Membership dates 01/01/2020 -

Entitlement for period 362.6 hours (325.6 hours Pro Rata) (37 brought forward)

From	To	Duration	Remaining entitlement
19/09/2022	19/09/2022	7.4	355.2
07/11/2022	11/11/2022	37	318.2
22/12/2022	22/12/2022	7.4	310.8
23/12/2022	23/12/2022	7.4	303.4
26/12/2022	26/12/2022	7.4	296
27/12/2022	27/12/2022	7.4	288.6
28/12/2022	28/12/2022	7.4	281.2
29/12/2022	29/12/2022	7.4	273.8
30/12/2022	30/12/2022	7.4	266.4
02/01/2023	02/01/2023	7.4	259
13/02/2023	15/02/2023	22.2	236.8
07/04/2023	07/04/2023	7.4	229.4
10/04/2023	10/04/2023	7.4	222
01/05/2023	01/05/2023	7.4	214.6
29/05/2023	29/05/2023	7.4	207.2
28/08/2023	28/08/2023	7.4	199.8

On this page you can see the total annual leave entitlement for the period (in hours) and a list of annual leave that has been taken, including the dates and the total amount of time that was taken. The remaining entitlement for the last instance of annual leave in this list is the total remaining annual leave entitlement for that person.

Please note: Public holiday entitlement was previously worked out separately and the employee had to add any surplus entitlement to their overall annual leave manually. The system now calculates public holiday entitlement automatically and deducts the correct number of hours based on the employee’s working pattern. In the example above, this relates to a full time employee employed throughout the entire leave period therefore they have been given an extra 88 hours (12 days) within their “Entitlement for period”, but then had these 88 hours deducted which you can see listed above meaning their annual leave entitlement remains unchanged. Part time staff will end up with hours being added or deducted from their overall entitlement based on their working pattern.

Entering an Annual Leave Entitlement Adjustment

If a member of staff will have some remaining annual leave entitlement that does not come to either a half or full day, you can enter an adjustment against their entitlement and “top up” their entitlement with Flexi time to the next half day. In the example below Michael Brown has 2.1 hours of annual leave left so we would top up his annual leave to 3.7, if he had 6 hours remaining we would top it up to 7.4 hours. Although Academic staff are not eligible for Flexi time, they can agree with their manager to work this time back.

To do this, sign in to iTrent and click on the “Our Staff” button on the iTrent home page and search for the staff member as described in the [Searching for an Employee](#) section of this guide. This will open the summary page for that person.

Michael Brown

Personal
Known as Michael
36396 (Personal ref.)

Employment
Administration Assistant

Calendar
VIEW FULL CALENDAR
04 - 17 November 2022
04 05 06 07 08 09 10 11 12 13 14 15 16 17

1 Sep 2022 - 31 Aug 2023
2.1 of 150.1 hours
Holidays remaining (as of last calculation)

LINKS
> Sickness Absences ▾ Holidays/Flexi Leave > Working Pattern

☰ ☰
Add New Holiday/Flexi Leave View Holidays/Flexi Leave Holidays Summary Holiday Adjustment

At the bottom of the page there is a “Links” section, click on the Holidays button and the holidays options will expand.

LINKS
> Sickness Absences ▾ Holidays/Flexi Leave > Working Pattern

☰ ☰
Add New Holiday/Flexi Leave View Holidays/Flexi Leave Holidays Summary Holiday Adjustment

Click on the Holiday Adjustment button to open Holiday entitlement adjustment page.

Holiday entitlement adjustment

 ▼ MENU ↻ 🖨️ 📎

Employment details

Position Administration Assistant ▼

Period details

Holiday period dates 01/09/2022 - 31/08/2023 ▼

Scheme name Annual Leave Support ▼

Entitlement for period 325.6 hours (325.6 hours Pro Rata)

Brought forward 37

Brought forward not used (lost) 0

Adjustment details

Adjustment type Adjust ▼

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
				31/08/2023	📅	+	-

Save

In the Period details section of the page, check that the drop down menu for Holiday period dates is for the current annual leave period and in the Adjustment details section change the Adjustment type option to “Adjust” as in the screenshot above.

Enter the number of hours to be carried forward in to the value field and type “Top up of annual leave” into the Reason field.

Adjustment details

Adjustment type Adjust ▼

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
1.6		1.6	Top up of annual leave	31/08/2023	📅	+	-

In the example above, Michael Brown will be leaving part way through the annual leave period and so only has 2.1 hours available as remaining annual leave before he will finish working at the University. This would not leave him with enough hours to book either a full day (7.4 hours) or a half day (3.7 hours) and so his manager would agree with him to work an extra 1.6 hours and top up his entitlement so that he will be able to book off his remaining annual leave.

Please Note: the hours carried forward should be decimalised i.e. one full day of 7 hours and 24 minutes should be entered as 7.4 hours. In the example above 3 full working days of 7 hours and 24 minutes will be carried forward as 7.4 x 3 is 22.2.

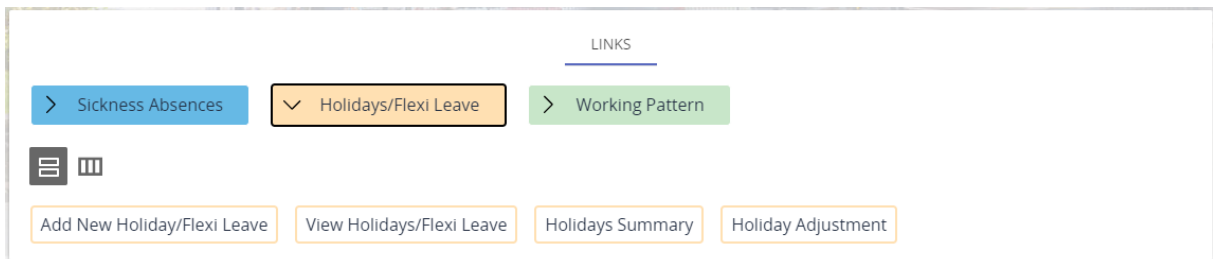
Click on the save button and the hours will be carried over in to the new annual leave period.

Checking Carry Forward

Staff can carry forward up to 5 days unused leave to the next holiday year (pro rata for part time staff) which should be taken within the first 4 calendar months of the new leave year.

Once a new holiday year starts, any remaining annual leave entitlement from the previous year up to their maximum amount will be automatically carried forward and will be included in the overall balance for the new holiday year.

You can check how much annual leave entitlement has been carried over for a member of staff by checking their Holiday entitlement adjustment page in iTrent. To do this, sign in to iTrent and click on the "Our Staff" button on the iTrent home page and search for the staff member as described in the [Searching for an Employee](#) section of this guide. This will open the summary page for that person. At the bottom of the page there is a "Links" section, click on the Holidays button and the holidays options will expand.



Click on the Holiday Adjustment button to open Holiday entitlement adjustment page.

The screenshot shows the 'Holiday entitlement adjustment' page. The page is divided into three main sections: 'Employment details', 'Period details', and 'Adjustment details'.
- **Employment details:** Position is set to 'Administration Assistant'.
- **Period details:** Holiday period dates are '01/09/2022 - 31/08/2023', Scheme name is 'Annual Leave Support', Entitlement for period is '325.6 hours (325.6 hours Pro Rata)', Brought forward is '37', and Brought forward not used (lost) is '0'.
- **Adjustment details:** Adjustment type is 'Adjust'.
Below these sections is a table for recording adjustments:

Date entered	User name	Value	Reason	End date	Entitlement Add	Remove
				31/08/2023	+	-

A green 'Save' button is located at the bottom of the page.

The number of hours carried over is displayed in the *Brought Forward* field. Any carry forward must be used before the end of December. If this has not been used by this time, the time will be lost and the number of hours that were lost will appear in the *Brought forward not used (lost)* field.

In certain circumstances a member of staff may have carried forward more than the standard allowance (e.g. if they have been on maternity leave or a period of long-term sickness). In this case, their standard carry forward would be included in the *Brought Forward* field, and the additional time would be shown as an annual leave adjustment as below.

Holiday entitlement adjustment

 ▼ MENU ↻ 🖨️ 📎

Employment details

Position

Period details

Holiday period dates

Scheme name

Entitlement for period

Brought forward

Brought forward not used (lost)

Adjustment details

Adjustment type

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
03/11/2022	SYSADMIN	<input type="text" value="7.400"/>	<input type="text" value="Additional carry forward"/>	<input type="text" value="31/08/2023"/>	<input type="text" value="370 hours"/>	<input style="width: 20px;" type="text" value="+"/>	<input style="width: 20px;" type="text" value="-"/>
		<input type="text"/>	<input type="text"/>	<input type="text" value="31/08/2023"/>	<input type="text"/>	<input style="width: 20px;" type="text" value="+"/>	<input style="width: 20px;" type="text" value="-"/>

Save

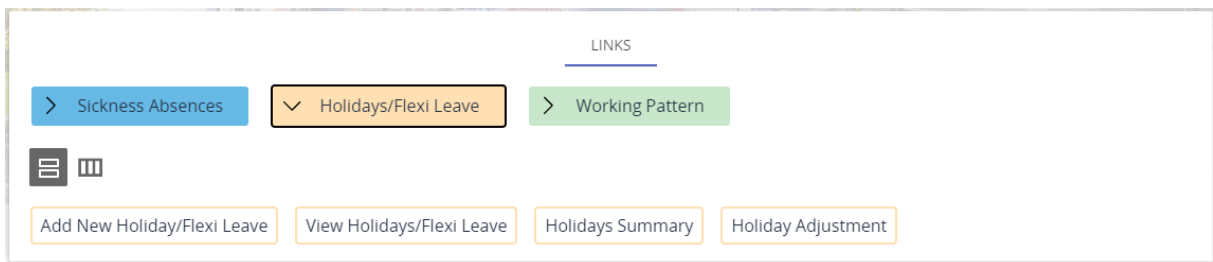
Flexi Leave

Using iTrent, you are able to both view previous instances of flexi leave, as well as enter a new flexi leave period for any member of staff within your School/Service.

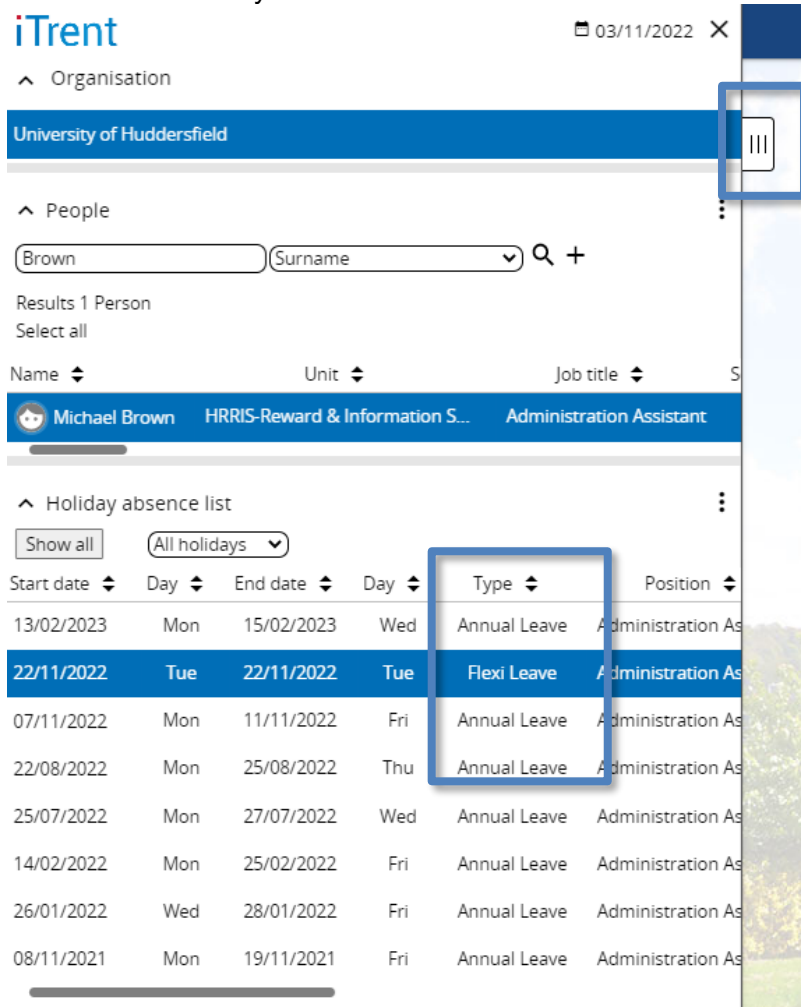
Viewing a Previous Flexi Leave Record

To view previous flexi leave records for a staff member, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the [Searching for an Employee](#) section of this guide.

This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays/Flexi Leave” button and the flexi leave options will expand.



Click on “Holidays/Flexi Leave History” and the previous absences on record will be shown on the left hand side of the screen listed by the absence start date. You can expand the side bar by clicking on the handle as in the screenshot below which will allow you to see if an absence was annual leave or Flexi leave more easily.



Selecting an absence from this list will open up the flexi leave record, allowing you to see details of the instance of flexi leave.

Michael Brown

Holiday absence details Michael Brown

Holiday period

Holiday period * Full day

Holiday start date * 22/11/2022

Absence type * Flexi Leave

Authorisation Not applicable

Position Administration Assistant (C433, 01/01/2020) (Current)

+ Holiday balances

Save Delete New

Note: The flexi leave instances in this list cover the previous 12 months. If you need to see records from before this, click on the “Show all” button and the list will change to include all flexi leave records.

Entering a New Flexi Leave Absence

To add a new flexi leave record, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the [Searching for an Employee](#) section of this guide.

This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Holidays/Flexi Leave button and the options will expand.

LINKS

> Sickness Absences

▼ Holidays/Flexi Leave

> Working Pattern

☰ ☰

Add New Holiday/Flexi Leave

View Holidays/Flexi Leave

Holidays Summary

Holiday Adjustment

Click on the “Add New Holiday/Flexi Leave” button. This will open a blank absence details page.

Michael Brown

Holiday absence details New MENU Refresh Print Link

Holiday period

Holiday period*

Holiday start date* Calendar icon

Holiday start type

Absence type*

Authorisation

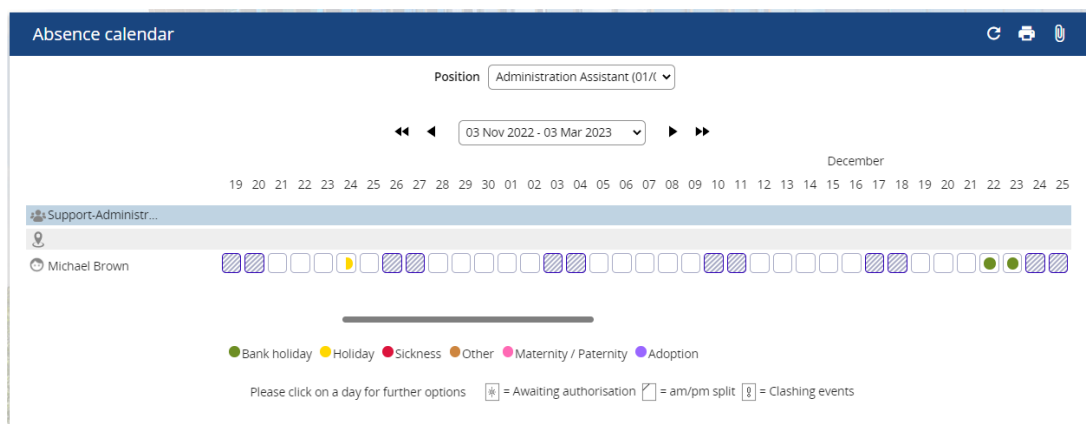
+ Holiday balances

Save

When entering a period of annual leave for a half day, select Part day as the *Holiday period* and Half Day – AM or Half Day – PM from the *Holiday start type* field. Select Flexi Leave from the *Absence type* drop down and then click on the Save button.

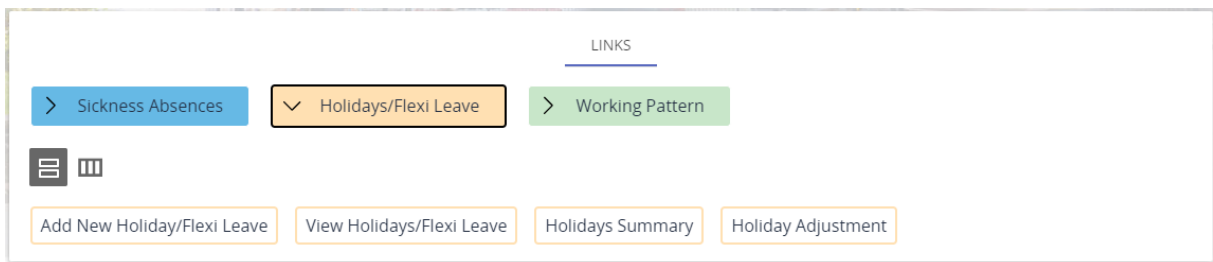
Please Note: Flexi leave should only be booked as a half or full day – the “More than one day” option should not be used.

This absence will now also appear on the Absence Calendar as a “Holiday” absence.

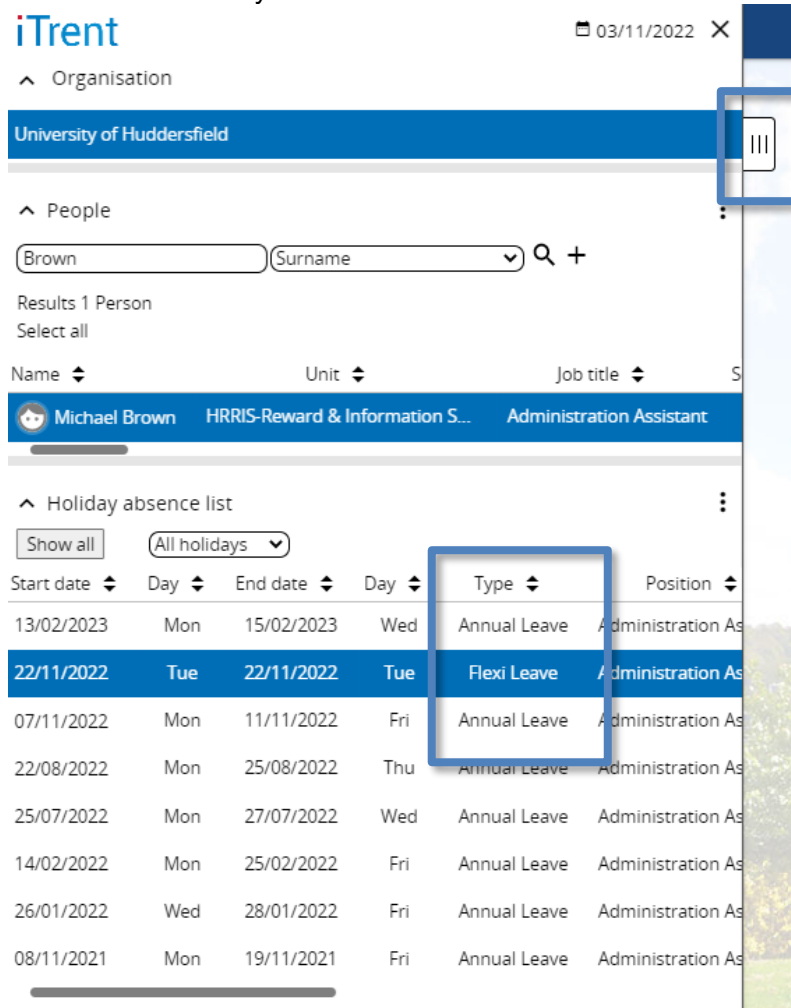


Amending or Deleting Flexi Leave

You can make amendments to a period of flexi leave or cancel a period of flexi leave via iTrent. This can be done by navigating to the relevant record by clicking on the “Our Staff” button on the iTrent home page Search for the staff member as described in the [Searching for an Employee](#) section of this guide. This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the “Holidays/Flexi Leave” button and the options will expand.



Click on the “View Holidays/Flexi Leave” button and a list of their holidays and flexi leave will appear on the left hand side of the screen listed by start date. You can expand the side bar by clicking on the handle as in the screenshot below which will allow you to see if an absence was annual leave or Flexi leave more easily.



Selecting a flexi leave record from this list will open the absence details page.

Michael Brown

Holiday absence details Michael Brown

Holiday period

Holiday period* Full day

Holiday start date* 22/11/2022

Absence type* Flexi Leave

Authorisation Not applicable

Position Administration Assistant (C433, 01/01/2020) (Current)

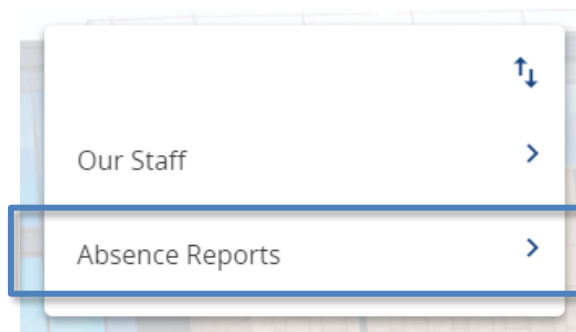
+ Holiday balances

Save Delete New

On this page you can amend the record by changing the relevant details and clicking the save button. If you need to delete the flexi leave record then you can click on the Delete button.

Absence Reports

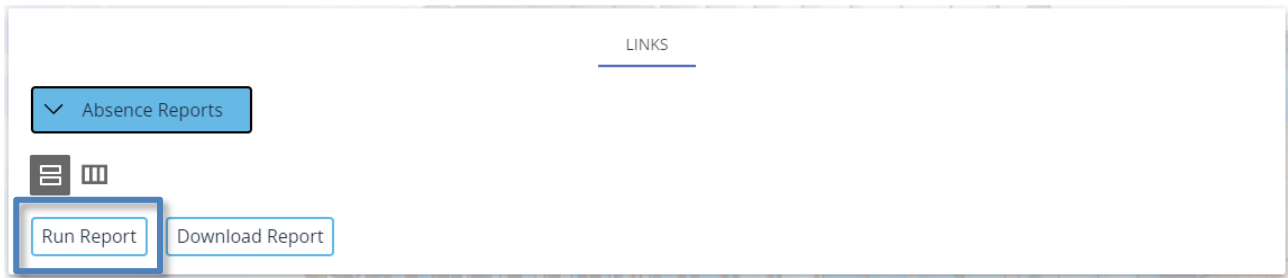
You are able to view some absence reports within iTrent by clicking on the “Absence Reports” button on the homepage.



When you click on this button you will see a list of available reports appear down the left hand side of the screen.



Click on the name of the report you would like to view and then click on “Run Report”.



Absence Frequency Report

This report provides a summary of the number of absences, days lost and hours lost during a specified time period and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

The example below would produce a report that shows everybody within the School/Service who had a period of sickness absence between 01/02/2019 and 31/07/2019. Changing the Unit/Employee field to employee would allow you to run the report for a specific employee.

 A screenshot of the 'Absence frequency' report form. The form has a dark blue header with the title 'Absence frequency' and a 'MENU' dropdown. Below the header, there are several input fields:

- 'Unit/Employee *' dropdown menu set to 'Unit'. A callout box points to it with the text: 'Leaving this as "Unit" runs the report for all employees'.
- 'Absence group' dropdown menu set to 'Sickness'. A callout box points to it with the text: 'Change absence group to "Sickness"'. The text 'Change absence group to "Sickness"' is written inside the callout box.
- 'Absence type' dropdown menu (empty).
- 'Absences from *' date field set to '01/01/2022'.
- 'Absences to *' date field set to '31/10/2022'. A callout box points to both date fields with the text: 'Enter date range'.
- 'Output type' dropdown menu set to 'CSV File'. A callout box points to it with the text: 'Output to CSV'.

 At the bottom of the form is a green 'Run' button.

When you click on the "Run" button, iTrent will start running this report ready for you to download. You can then use the instructions in the "[Downloading a Report](#)" section of this user guide to download this report.

Absence History - People Report

This shows each absence that an employee has had within a given time period and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

The example below would produce a report that shows all of the instances of sickness absence that Kyle Pittman has had during the 6 month period between 01/02/2019 and 31/07/2019.

The screenshot shows the 'Absence history' report configuration page. The fields and their values are: Unit/Employee* (Employee), Employee name* (Michael Brown), Absence group (Sickness), Absence type (empty), Absences from* (01/01/2021), Absences to* (31/10/2022), and Output type (CSV File). A green 'Run' button is at the bottom. Callout boxes provide instructions: 'Change to "Employee" and search for Michael Brown' points to the Unit/Employee and Employee name fields; 'Change absence group to "Sickness"' points to the Absence group field; 'Enter date range' points to the Absences from and to fields; and 'Output to CSV' points to the Output type field.

When you click on the “Run” button, iTrent will start running this report ready for you to download. You can then use the instructions in the [“Downloading a Report”](#) section of this user guide to download this report.

Outstanding Holiday Entitlement Report

The “Outstanding Holiday Entitlement” report shows a summary of outstanding annual leave as of the effective date provided and can be run for everybody within your School/Service or for an individual employee by changing the value in the Unit/Employee field.

This report can be used to identify staff who have too much annual leave remaining to carry in to the next annual leave entitlement period.

The example below would produce a report that shows everybody in your School/Service with at least 37 hours entitlement remaining (i.e. the maximum carry forward allowance) as of 01/08/2019. This would allow you to contact them before the end of the annual leave entitlement period so that they can arrange to book this annual leave otherwise they will lose it.

The screenshot shows the 'Outstanding holiday entitlement' report configuration page. The fields and their values are: Unit/Employee* (Unit), Effective date* (04/11/2022), Minimum balance to report on (empty), hours (37), and Output type (CSV File). A green 'Run' button is at the bottom. Callout boxes provide instructions: 'Show outstanding leave remaining from this date' points to the Effective date field; 'Leaving this as "Unit" runs the report for all employees' points to the Unit/Employee field; 'Set minimum hours to 37' points to the hours field; and 'Output to CSV' points to the Output type field.

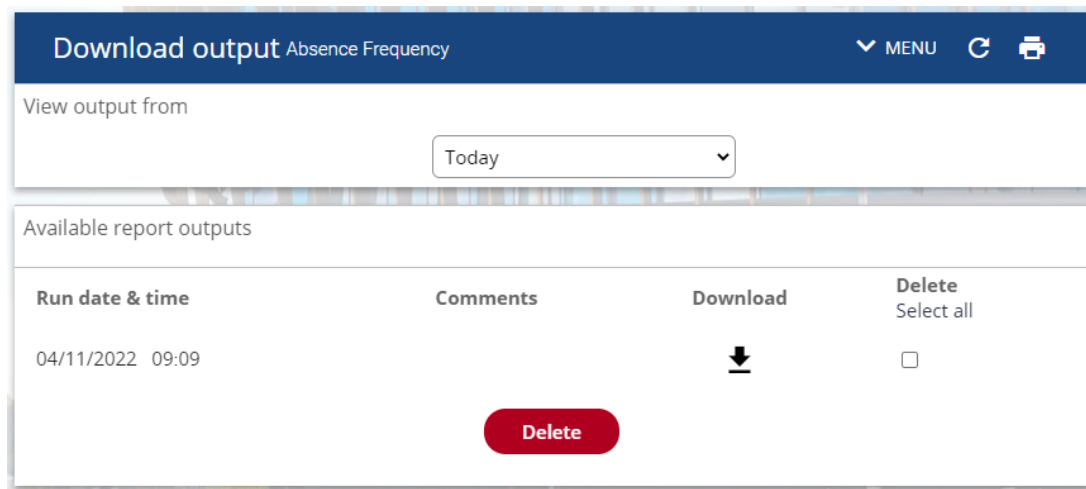
When you click on the “Run” button, iTrent will start running this report ready for you to download. You can then use the instructions in the [“Downloading a Report”](#) section of this user guide to download this report.

Downloading a Report

You can view the progress of a report by clicking on the “My to do list/Processes” button on your homepage and then clicking on the “Processes” tab. This shows you the status of all recent processes you have run.



When the report has changed to a status of “Complete” then you can click on the name of the report to take you to the Download Output page.



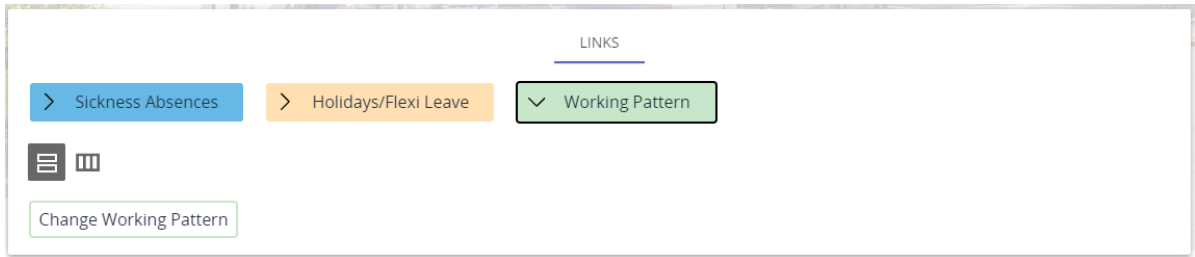
Click on the Download icon  to download the report.

Working Patterns

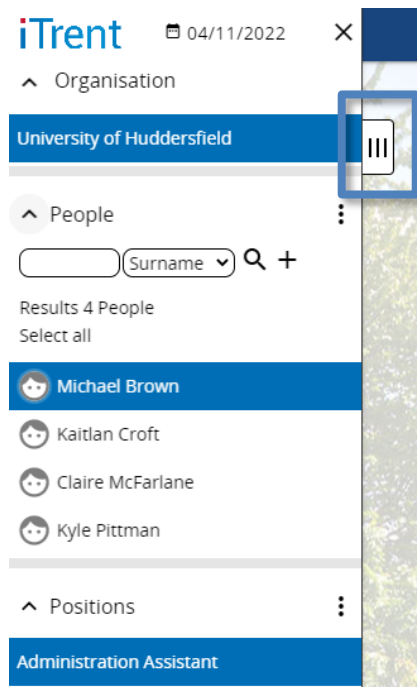
As an Absence Administrator, you can use iTrent to review and update the working patterns of employees within your School/Service without needing to contact HR.

To do this, go to the home page and click on the “Our Staff” button. Search for the staff member as described in the [Searching for an Employee](#) section of this guide.

This will open the summary page for that person. At the bottom of the page there is a “Links” section, click on the Working Pattern button and the working pattern options will expand.



Click on the Change Working Pattern button and a list of their positions will appear on the left hand side of the screen. Click on the handle on the sidebar (shown below) and the sidebar will expand providing more information.



Select the relevant position and the working patterns for that position will be available. The working pattern at the bottom of the list should be the latest working pattern and you will be able to see the current working pattern using the Start Date and the End Date.

Please Note: The latest working pattern should not have an end date against it.

Organisation

University of Huddersfield

People

Brown Surname Q +

Results 1 Person
Select all

Name	Unit	Job title	Sex	Date of birth	Social security no.	Per
Michael Brown	HRRIS-Reward & Information S...	Administration Assistant	Male			

Positions

Job title	Start date	End date	Contract
Administration Assistant	01/01/2020		7363605

Patterns

Pattern name	Type	Start day	Start date	End date
UOH Standard	Allowance Pattern	Week 1 / Day 1	01/01/1900	
Full Time	Working Pattern	Week 1 / Day 4	01/10/2020	

Clicking on a working pattern from this list will open the Pattern details page.

Michael Brown

Pattern details Working Pattern

Pattern information

Type* Working Pattern

Pattern* Full Time

Start day* Week 1 / Day 4

Start date* 01/10/2020

End date

Hours information

Contractual hours 37.00

Pattern days

Current day Week 1 / Day 4

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	07:24	07:24	07:24	07:24	07:24	00:00	00:00	37:00

Save New

On this page you can see the number of contracted hours and see how those hours are distributed over a working week. In the image above, this shows somebody who works for 37 hours from Monday to Friday, and so each day has 7 hours and 24 minutes.

Changing a Working Pattern.

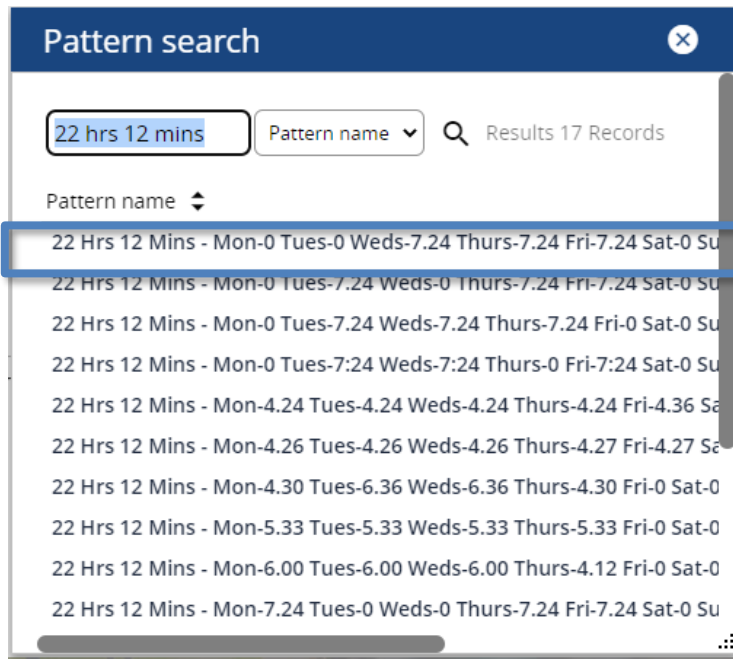
If an employee has a change in their working pattern, the working pattern held in iTrent will need updating either by their manager or an Absence Administrator. It is important that this is completed as the working pattern is used to calculate their annual leave and sickness entitlement.

Please Note: If you want to change the number of hours an employee works you must contact HR as this will involve a contractual change.

To change an employee's working pattern, follow the steps outlined above to open the Pattern details page and click on the New button. This will open a new Pattern Details page for you to complete.

The screenshot shows a web interface for creating a new working pattern. At the top, there is a user profile for Michael Brown. Below that is a header for 'Pattern details New' with a menu icon, a refresh icon, and a print icon. The main form is divided into two sections: 'Pattern information' and 'Pattern days'. The 'Pattern information' section contains five fields: 'Type' (a dropdown menu), 'Pattern' (a text input with a magnifying glass icon), 'Start day' (a dropdown menu), 'Start date' (a text input with a calendar icon), and 'End date' (a text input with a calendar icon). The 'Pattern days' section is currently empty. A green 'Save' button is located at the bottom center of the form.

Select Working Pattern the dropdown list for *Type* and then click on the magnifying glass icon next to the *Pattern* field which will open the Pattern search box. Enter the number of hours that the employee works during a week and click search. This will return all of the working patterns available for that number of hours. For example, if you were changing the working pattern for an employee that works 22 hours and 12 minutes over Wednesday to Friday search for 22 Hrs 12 Mins and select the relevant pattern.



If the working pattern you need is not available, please contact myhr@hud.ac.uk for assistance.

The “Pattern day” section of the Pattern details page should have now been populated.

Pattern days

	Day1	Day2	Day3	Day4	Day5	Day6	Day7	Total
Week 1	00:00	00:00	07:24	07:24	07:24	00:00	00:00	22:12

Enter the date that the new working pattern will begin in to the *Start* date field and then press the tab key on your keyboard. This will update the “Pattern days” section of the page so that instead of listing the days by number it has the names of each day.

Pattern details New
MENU ↻ 🖨

Pattern information

Type * Working Pattern

Pattern * 22 Hrs 12 Mins - Mon-0 Tues-0 Weds-7.24 Thurs-7.24 Fri-7.24 Sat-0 Sun-0

Start day * ▼

Start date * 03/11/2022 📅

End date 📅

Hours information

Contractual hours 37.00

Pattern days

	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Total
Week 1	00:00	00:00	07:24	07:24	07:24	00:00	00:00	22:12

Save

Change the *Start day* field to reflect which day of the week the *Start date* is with a Monday being day 1. In the example above, the 3rd November 2022 is a Thursday and so the *Start day* field should be Week 1 / Day 4. If the *Start date* had been 4th November 2022 then the *Start day* would be Week 1 / Day 5 (Friday)

The “Pattern days” section of the page should update again with the working pattern now being correct.

Pattern days

	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Total
Week 1	00:00	00:00	07:24	07:24	07:24	00:00	00:00	22:12

Click on the Save button and the working pattern will be saved and will take effect from the Start date that was specified when setting the working pattern up.

Employee’s Working Less Than 52 Weeks Per Year

If you have an employee that works less than 52 weeks per year, you should follow the steps above and add a new working pattern using the pattern name “None Working Period” for the dates the employee is not contracted to work. This ensures that if they work during a period which contains a bank holiday then this entitlement is not deducted from their overall entitlement.