Manager Self-Service (MSS)

Software Version: 2.1
Date Released: April 2025
URL: https://ce0663li.webitrent.com/ce0663li_web

Version History

Software Version	Date Released	Release Notes
2.1	April 2025	Leavers Process added (see 5. Processes)
2.0	November 2024	Organisation Chart added (see 4.1 Organisation Chart)
		Reviews added (see 7. Reviews)
		Management Information added (see 8. Management Information)
		Insight Builder added (see 9. Insight Builder)
1.0	April 2021	Initial Release

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1. Overview

1.1 What Is Manager Self-Service?

iTrent is the HR & Payroll system that Sefton Council has used to manage and pay employees since April 2021. Manager Self-Service (henceforth known as MSS) is a lite version of iTrent, configured to allow managers to see and, in some cases, interact with iTrent in a controlled manner to achieve business needs.

1.2 Accessing Manager Self-Service

To access MSS, navigate to the URL on the front of this guide (or scan the QR code). From the login screen, click ‘Single Sign-on account’, and follow through the Single Sign-On (SSO) process using your work email address and the password associated with your work email address.

Managers are added to MSS on a weekly basis, so if you are having issues logging in and have recently started a new role you may have to wait up to a week to be able to log in.

1.3 Key Features

The current key features of MSS are:

- Viewing and managing your current staff’s details, such as hours, pay grade, and absences, on an individual basis or through management information reports.
- Viewing and managing your structure, including vacancies, on an individual basis or through management information reports.
- Authorising expense claims.
- Notifying payroll of organisation and position leavers and receiving feedback as leavers are actioned by payroll.
- Performing reviews (such as PDRs, 121s and Probationary Reviews) for your staff.
- Viewing, managing, and being notified of the expiry dates of key right-to-work documents.
- Viewing, managing, and being notified of the expiry dates of temporary arrangements, such as changes of hours, acting up arrangements, and fixed-term contracts.

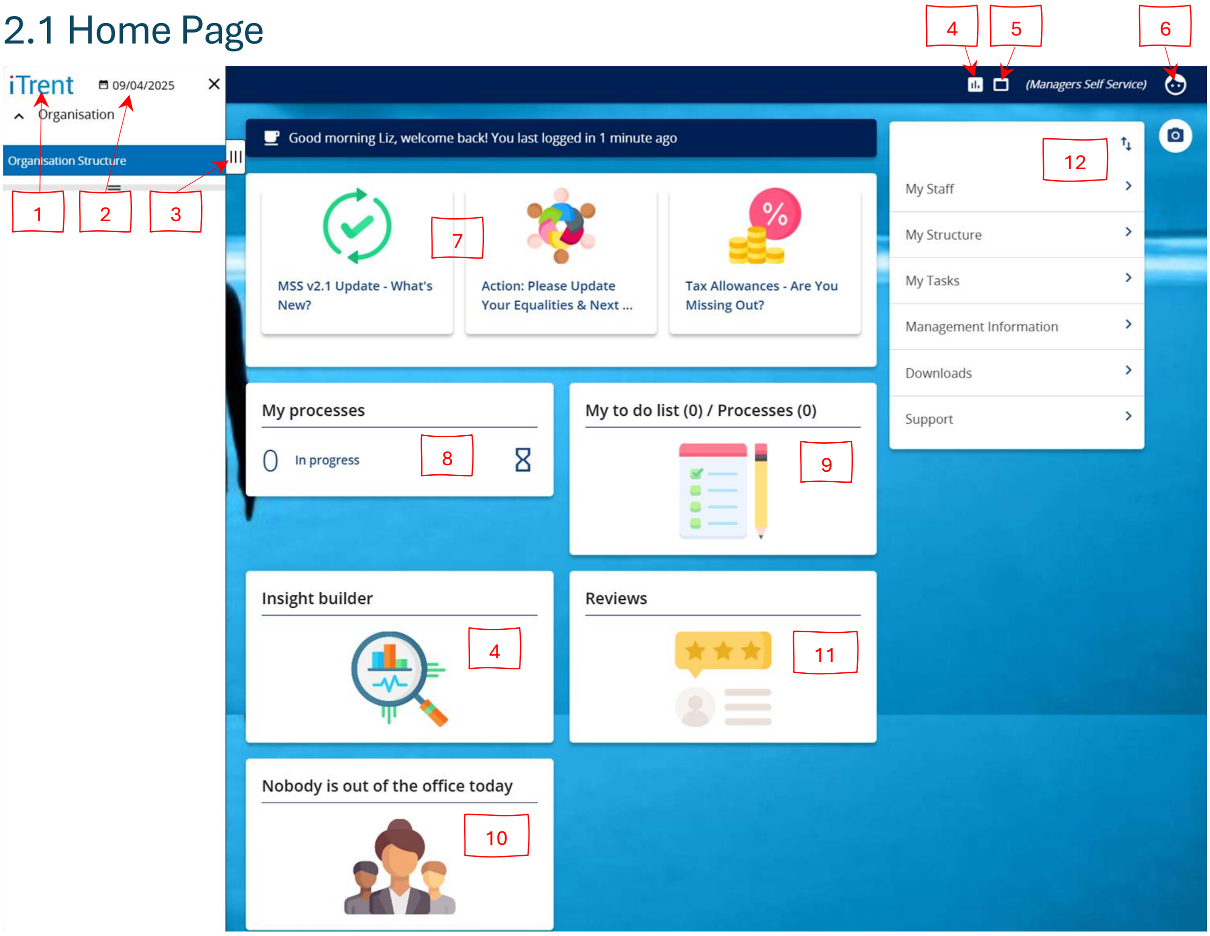
1.4 Future Roadmap

Features coming to MSS in future updates include:

- Time & Attendance – the ability to track your staff’s current flexitime and holiday balances, as well as to adjust these balances. This will be rolled out alongside the Time & Attendance module in Employee Self-Service (ESS).
- Sickness Monitoring – increased visibility of sickness information through management information reports.

2. Using iTrent

2.1 Home Page



1) **iTrent Logo:** This is available on every screen in iTrent and will take you to the home page.
2) **System Date:** iTrent is a date driven system, meaning most screens will show information as at the system date. This will default to the current date, and unless there is a specific reason to do otherwise, you will normally want to leave this as it is.
3) **Expand Menu:** Click this to expand the left-hand menu. This is useful as the left-hand menu shows search results when searching for a person or position and expanding it can show more detailed search results.
4) **Insight Builder:** See 9. Insight Builder.
5) **New Tab:** You can have multiple iTrent tabs open at once. Clicking here will open a new tab.
6) **My Profile:** Expandable menu that allows you do manage your preferences, change your password, and log out.
7) **News Feed:** You can find the latest MSS related announcements here, such as upcoming system downtime.
8) **Processes:** See 5. Processes.

9) **To-Do List:** This is where any outstanding tasks, such as expense authorisations, will sit. You will receive an email when you receive a task.

10) **Reportee Calendar:** See 10. Reportee Calendar.

11) **Reviews:** See 7. Reviews.

12) **Section Menu:** This menu allows you to access most iTrent screens. For example, clicking Your Staff will allow you to enter all person-based screens (such as Absence Details), while clicking Your Structure will allow you to enter all position-based screens (such as Position Occupancy History).

2.2 Navigation

2.2.1 Sections, Folders & Screens

For navigation purposes, all screens in iTrent belong to folders, which in turn belong to sections. In this user guide you will see directions to pages in the format **My Tasks > Redirect Tasks > My Task Redirection Details**. In this example you would open the My Tasks section, then open the Redirect Tasks folder, and finally open the My Task Redirection Details screen.

2.2.2 Sections

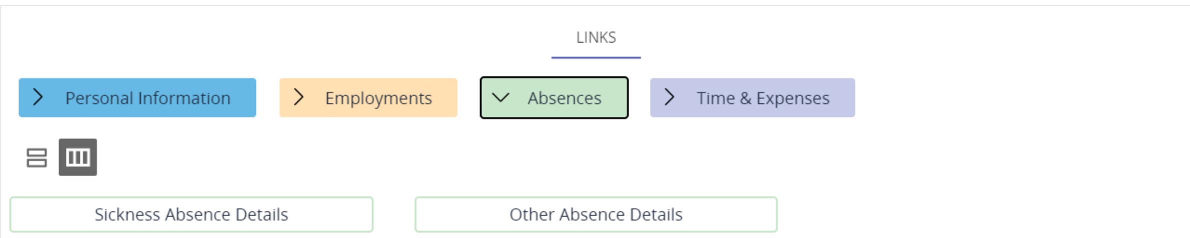
Sections are found on the home page (see point 12 on 2.1 Home Page). Clicking on a section will open a new page, where you will see all folders and screens within that section.

Note: *An exception to this is when opening the My Staff section, where you will see a list of your staff in the left-hand menu. You must select a member of staff, where you will be taken to the Person Summary page for that member of staff. You can then find the folders and screens for that person by scrolling down.*

You have access to the following sections:
My Staff – **My Structure** – **My Tasks** – **Management Information** – **Downloads** – **Support**.

2.2.3 Folders

Once you are in a section you will see all folders within that section. These folders can all be expanded with a click to see all screens within the folder. Clicking on a screen will take you into the screen.



An example of the My Staff section, with the Absences folder expanded, and the 2 screens within the folder visible.

You have access to following folders:
My Staff: Personal Information – Employment – Absences – Time & Expenses – Reviews
My Structure: Positions
My Tasks: Redirect Tasks
Management Information: People Reports – Structure Reports – Additional Information
Downloads: MSS Documentation
Support: Contact Us

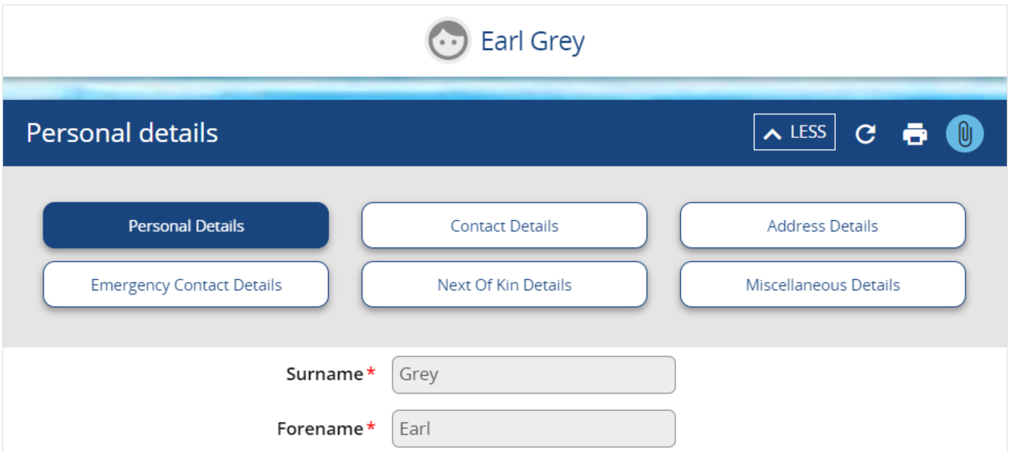
2.2.4 Screens

Screens are ultimately where you will be able to view, and in some cases amend, information held within iTrent. If a screen is editable, you will see a Save button at the bottom of the screen. If you can create a new entry into this screen (e.g. adding a new period of sickness into the Sickness Absence Details screen) then you will also see a 'New' button at the bottom of the screen.

2.2.4.1 Moving Screens Within a Folder

Every screen has a menu button towards the top-right of the screen. If you want to move from one screen to another within the same folder (e.g. Personal Details to Contact Details, both within the Personal Information folder) then you can do so by clicking the menu button to expand the menu and selecting the new screen.

The Personal Details screen, with the top-menu collapsed.



The Personal Details screen, with the top-menu expanded.

3. Your Staff

As a manager, you have permission to access the records of your direct reportees, as well as their direct reportees, and so on. You can access staff-based screens by selecting the My Staff section on the Home Page. You will find a list of your direct reportees pre-populated in the left-hand menu, however, if you select the search icon you can expand this search to show all staff that you have access to. If you have access to many staff, you can access a record directly by searching by Personal Reference, or trim down the search results by searching by alternative details such as Surname using the drop-down list in the search area.

3.1 Staff Summary

The default page when you open a staff member's record is the Staff Summary screen. This screen shows a summary of some personal details, some employment details, the staff member's calendar (see 10. Reportee Calendar), and the folders and screens (see 2.2.3 Folders) that you have access to.

3.2 Personal Information Folder

The following screens are found in the Personal Information folder. They are all currently read-only. Your staff can amend these details in Employee Self-Service:

- ❖ Personal Details – This screen shows basic details about a person, such as name, DOB, and gender.
- ❖ Contact Details – This screen shows contact details, such as email address.
- ❖ Address Details – This screen shows a person's home address.
- ❖ Emergency Contact Details – This screen shows a person's emergency contact.
- ❖ Next Of Kin Details – This screen shows a person's next of kin.
- ❖ Miscellaneous Details – This screen shows any information that doesn't fit into the above categories.

3.3 Employment Folder

The following screens are found in the Employment folder. They are all currently read-only and are managed by core system users, such as payroll:

- ❖ Position Details – This screen shows basic details about a position, such as job title, location, and expected end date.
- ❖ Occupancy Details – This screen shows details about the occupancy, such as the occupancy start date.
- ❖ Hours & Basis – This screen shows contractual hours, annual weeks worked, and occupancy type (fixed term, casual, etc).
- ❖ Pattern Details – This screen shows working patterns. As of v2.1 working patterns are not used, but they will be launched alongside the Time & Attendance module (see 1.4 Future Roadmap)
- ❖ Salary Details – This screen shows personal salary details if a person is not on a standard pay grade. It is very rarely populated.
- ❖ Payscale Values – This screen shows pay details, such as grade and full-time

salary.
- ❖ Probationary Period Details – This screen shows the probationary period start and end dates.

Note: *As a person can be in multiple positions, when you enter one of the Employment screens a person's positions will show at the bottom of the left-hand menu. Make sure you have the correct position selected, as one will select by default.*

3.4 Absences Folder

The following screens are found in the Absence folder. They are all currently read-only and are managed by core system users, such as payroll:

- ❖ Sickness Absence Details – This screen shows all details of a period of sickness, such as absence start date, absence end date, and absence reason.
- ❖ Other Absence Details – This screen shows all details of a non-sickness absence, such as absence start date, absence end date, and absence reason.

Note: *As a person can have multiple absences, when you enter one of the Absence screens a list of a person's relevant absences will show at the bottom of the left-hand menu.*

3.5 Time & Expenses Folder

The following screens are found in the Time & Attendance folder:

- ❖ Claim Details – This screen shows a detailed, day by day and journey by journey, version of all submitted expense claims.
- ❖ Claim Summary – This screen shows a summary of all submitted expense claims, as they will look on the payslip, as well as the current authorisation status.

Note: *As a person can have multiple expense claims, when you enter one of the Time & Expenses screens a list of a person's expense claims will show at the bottom of the left-hand menu.*

3.6 Reviews Folder

The following screens are found in the Reviews folder:

- ❖ Review Summary – This screen shows an overview of a person's reviews, containing information such as scheduled reviews, completed reviews, and a review calendar.
- ❖ Objective Overview – This screen shows an overview of a person's objectives, containing information such as the description of the objective, and the status.

3.7 Leaver Process Folder

The following screens are found in the Leaver Process Folder:

- ❖ Leaver Process History – This screen shows a history of all leaver processes that have been done for this person, including any in-progress processes.

Note: *As a person can have leaver processes against them in instances where they have left multiple positions in the past, when you enter the Leaver Process History screen a list of the person's processes will show at the bottom of the left-hand menu.*

4. Your Structure

4.1 Organisation Chart

As a manager you can see a portion of the organisation chart, a hierarchical view of all positions (and occupants if the position is occupied) that sit below you in the reporting structure.

4.1.1 Opening the Organisation Chart

To access the organisation chart:

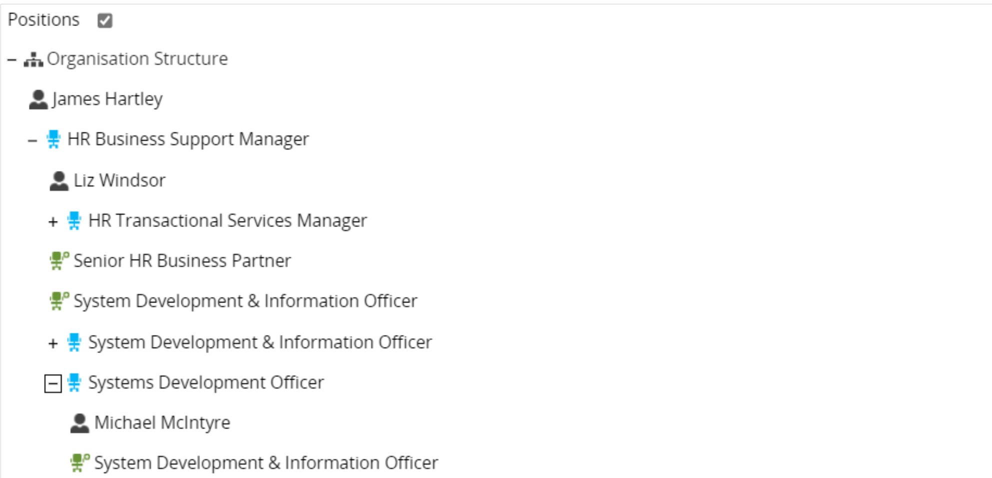
1) Select the My Staff section from the home page to open the staff list in the left-hand menu.
2) Select the 3 vertical dots at the top-right of this menu and select Reporting View from the drop-down list that shows.
3) Tick the Positions checkbox, as this shows position names and vacancies.
4) Click the plus icon to the left of the Organisation Structure unit to expand it.

Note: *Expanding the left-hand menu (see point 3 on* *2.1 Home Page**) is advised when viewing the organisation chart.*

4.1.2 Viewing the Organisation Chart

You are initially met with all positions that report directly to you. Blue positions are occupied, and green positions are vacant.

If you expand an occupied position (by clicking the plus icon to the left of the position name) you will see the name of the person occupying the position, as well as any positions that report to that position. These positions can be expanded to show further positions that report to them, and so on.



An example of an organisation chart, with James Hartley managing Liz Windsor (HR Business Support Manager), Liz Windsor managing five positions (two vacant and three occupied), one of which is Michael McIntyre (Systems Development Officer), who himself manages one vacant position (Systems Development & Information Officer).

4.2 Positions Folder

The following screens are found in the Positions folder. They are all currently read-only and are managed by core system users, such as payroll.

- Position Details – This screen shows basic details about a position, such as the job title, position reference, and start date. If a position is due to be removed from the structure (for reasons such as a cease to the funding or an acting up arrangement ending) then it will also show the expected position end date and the expected position end reason.
- Occupancy Details – This screen shows details of the current occupancy, such as the current occupant and the occupancy start date. If an occupancy is due to end (for reasons such as the end of a fixed-term role) then it will also show the expected occupancy end date and the expected occupancy end reason.
- Position Occupancy History – This screen shows a history of all occupants that have ever occupied a position, as well as the occupancy start and end dates of these occupancies. The occupancy history of positions has been recorded in iTrent since 01/12/2023, therefore any earlier occupancy won’t show.
- Position Summary – This screen shows a history of everything that has ever been held against a position. Most of this is irrelevant to managers, however this is the default position-based screen in iTrent it cannot be removed.

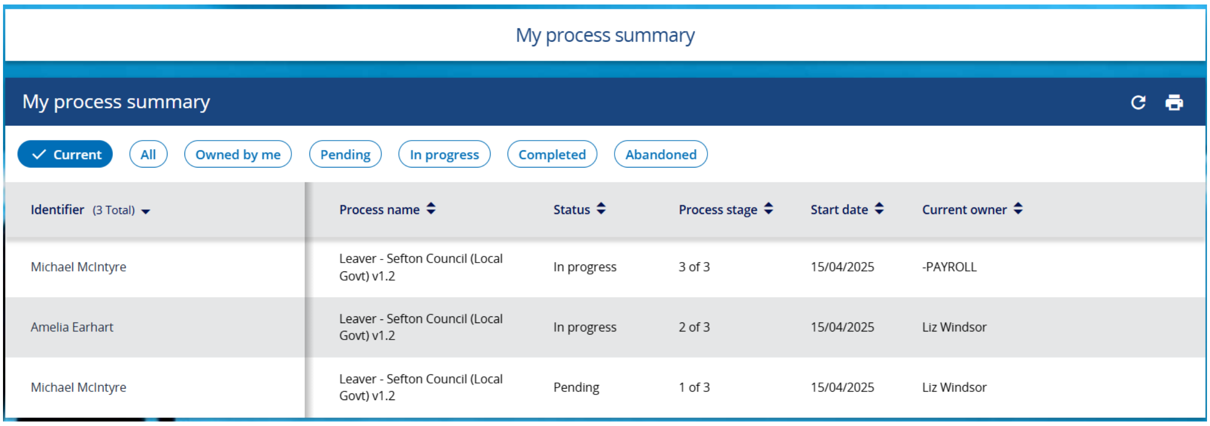
5. Processes

Processes are a new area of iTrent that will aim to streamline common tasks in the future. There is currently one process, the Leaver process.

5.1 My Process Summary

The My Process Summary screen shows an overview of all processes that you are currently, or have ever been, a part of. Currently, as the leaver process is the only process in MSS, this screen will show all leavers you have ever submitted.

The screen can be accessed on the home page of MSS (see point 8 on 2.1 Home Page).



Identifier (3 Total)	Process name	Status	Process stage	Start date	Current owner
Michael McIntyre	Leaver - Sefton Council (Local Govt) v1.2	In progress	3 of 3	15/04/2025	-PAYROLL
Amelia Earhart	Leaver - Sefton Council (Local Govt) v1.2	In progress	2 of 3	15/04/2025	Liz Windsor
Michael McIntyre	Leaver - Sefton Council (Local Govt) v1.2	Pending	1 of 3	15/04/2025	Liz Windsor

You can use the filters above the list of processes to filter what processes show.

Note: Some process may remain in progress for a while due to processing timelines. For example, if you submit a leaver several months in advance then payroll will normally hold off on actioning the leaver until the month the person is due to leave.

5.1.1 Identifier

The Identifier column shows the person who the process belongs to (i.e. the person leaving for the leaver process). You can access the process, even if it has been completed, by clicking on the name in the Identifier column.

5.1.2 Status

This shows the current status of each process. A description of each status is as follow:

Pending - This process has passed the first stage yet.

In Progress - The process is in progress. See the Process Stage for details as to what stage the process is at.

Completed - This process has been actioned by payroll.

Abandoned - This process was not completed. This could be due to payroll rejecting the process or you withdrawing it.

5.1.3 Current Owner

The Current Owner column shows who the process is currently with. For the leaver process this will either be you or payroll (-PAYROLL). You can filter processes that are with you using the 'Owned by me' filter.

5.2 Leaver Process

5.2.1 Submitting a Leaver

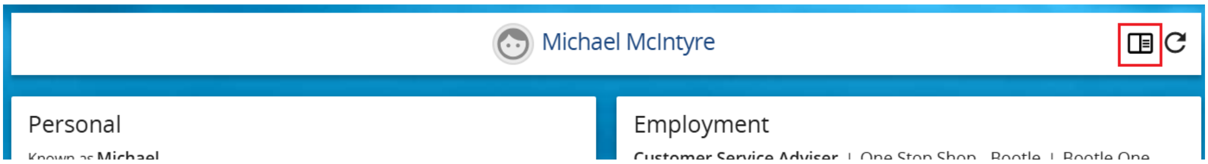
Leavers are submitted at position level, so if a person is leaving multiple positions that all report to you then you will need to create one leaver per position.

The leaver process currently covers Sefton Council staff on Local Government T&Cs, therefore if you do not see a leaver to select on step 3 then this member of staff does not meet these criteria. If you believe that this staff member does meet these criteria, but a leaver is not showing, then contact Establishment Control who will be able to fix this.

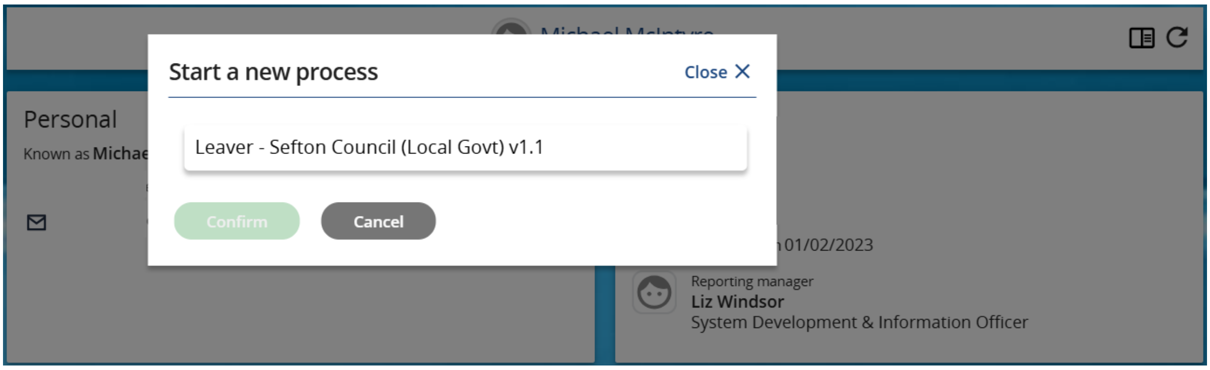
To submit a leaver:

1) Navigate to **My Staff** and select the person who is leaving from the staff list on the left-hand menu. This will take you to the person's Staff Summary screen.

2) Click the 'Start a New Process' icon.



3) When prompted, select the 'Leaver - Sefton Council (Local Govt)' process, and click Confirm.



4) On the Leaver Details page that opens, you need to answer all mandatory

questions and any applicable non-mandatory questions. Any additional information relevant to a question can be accessed by clicking the ❶ icon on the question.

If at any point you need to leave and return to the process, you can click Save. At this point the process will save to your 'My Process Summary' screen where you can return to complete it later.

Is the employee moving to a new job within Sefton Council?

Answer Yes if this leaver is part of a transfer to a new role within Sefton Council. This can include a new role in a Sefton school or in Sefton Supply Services. Otherwise, answer No.

Date of Leaving

This is the last date of employment and is the date that the employee will be paid to.

Reason for Leaving

Select the reason for leaving. If the leave reason doesn't show in the list of responses for 'Reason for Leaving' but does show in the list of responses for 'Other Reason (HR Input Only)' then contact Corporate HR as leavers of this type need to go through HR.

Other Reason (HR Input Only)

Do not use this field. If the leave reason is one of these reasons then contact Corporate HR as leavers of this type need to go through HR.

Position Name

Enter the full Position Name as it shows in MSS. Details can be found in the Position Details screen under **My Staff > Employment > Position Details**.

Position Reference (POSN000000)

Enter the full Position Reference as it shows in MSS in the format POSN000000. This can be found in the Position Reference field of the Position Details screen under **My Staff > Employment > Position Details**.

If Redundancy or Dismissal, Date of Notice (dd/mm/yyyy)

Do not use this field. If the leave reason is redundancy or dismissal then contact Corporate HR as leavers of this type need to go through HR.

If Death, Date of Death (dd/mm/yyyy)

If the leave reason is 'Death in Service', then enter the date of death.

If TUPE, Name of New Employer

Do not use this field. If the leave reason is TUPE, then contact Corporate HR as leavers of this type need to go through HR.

Overtaken Holiday Hours (0.00) / Undertaken Holiday Hours (0.00) / Undertaken Holiday Hours Explanation

If a person leaves part-way through the holiday year then they should be encouraged to take all remaining holidays before leaving. All information on annual leave, including a link to the Annual Leave Calculator, can be found on the Sefton Intranet site by visiting https://intranet.smbc.loc and navigating to **Personnel > Policies and procedures > Working hours and time off > Annual Leave** or by clicking **HERE**.

If the person has overtaken their holiday allowance, then enter the number of **hours** overtaken in the 'Overtaken Holiday Hours' field so payroll can recover any monies owed. If the person hasn't taken all remaining holidays before leaving, then enter the number of **hours** that were remaining when the employee left in the 'Undertaken Holiday Hours' field so payroll can pay any monies owed. The reason why the remaining hours couldn't be taken **must** be entered into the 'Undertaken Holiday Hours Explanation' field if applicable or the leaver will be rejected by payroll.

Training Costs to Be Recovered (£0.00)

If any training costs are to be repaid then enter the monetary amount.

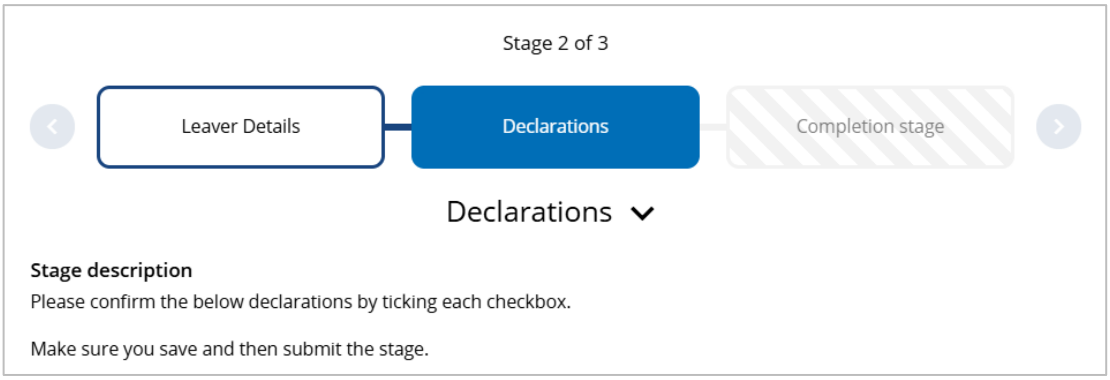
If Leaving Organisation, Private Email Address

If the person is not leaving the organisation then this can be left blank. However, if the employee is leaving the organisation, then you need to enter a private email address for the person so they can continue to access ESS for 3 months after leaving. If you fail to do this then the person will lose access to ESS when their work email address is deleted upon leaving.

Additional Information

iTrent currently mandated that this field is mandatory. You can enter any additional information that you believe payroll may need to action the leaver. If you have no additional information to add then just enter a single character such as a full stop.

5) Click Save and then click Submit Stage. **Question responses will not register when submitting the stage unless you have saved the response first.** You will then see the process move to the Declarations stage. If it doesn't move automatically then click on the Declarations stage on the crumb trail.



6) On the Declarations page read and acknowledge that you have checked all declarations and actioned any that are relevant. If they aren't relevant, checking the box will confirm that you have checked and confirm that the declaration is not relevant. Any additional information relevant to a declaration can be accessed by clicking the ℹ icon on the declaration.

   I have informed ICT if the person is leaving the organisation and has a sefton.gov.uk email address.
   If the person is leaving the organisation and has a sefton.gov.uk email address then you need to inform ICT so they can remove the email address from the directory. If the person is not leaving the organisation or does not have a sefton.gov.uk email address then ticking the checkbox confirms that you have checked this.

   I have checked if this person is eligible for a long service award and, if applicable, completed the application form on their behalf.
   If the person leaving has over 25 years' service and left because of retirement or redundancy, they will be eligible to receive a one-off payment of £150. It is the responsibility of the manager to fill this application in on their behalf. If the person is not eligible for the long service award, then ticking the checkbox confirms that you have checked this.

   I have advised the employee to download any pay related documentation prior to leaving (P60's, Payslips) as access will expire after 3 months. P45 will be available to download once the final payment has been processed.
   All documents can be found on ESS once the final pay has been processed. ESS can be accessed by visiting https://ce0663li.webitrent.com/ce0663li_ess. Access will expire 3 months after leaving.

   I have notified the employee that if they are expecting further payments, including late pay awards, that they will need to notify Payroll of any bank account changes.
   Payroll can be contacted by email at payroll@sefton.gov.uk.

   If the employee has been on maternity or adoption leave in the 3 months leading to their leaving date, I have notified them that they may have been overpaid, and any overpayment will be recovered by the organisation.
   Any potential overpayments can be confirmed with payroll prior to submitting the leaver form if needed. Payroll can be contacted by email at payroll@sefton.gov.uk. If the employee has not been on maternity or adoption leave in the 3 months leading to their leaving date then ticking the checkbox confirms that you have checked this.

   If the employee is currently absent form work (Sickness, Maternity, etc), I can confirm that I have updated the absence system.
   If the employee isn't currently absence then ticking the checkbox confirms that

you have checked this.

I have informed the employee that if they are currently repaying an overpayment or for a bike via their salary then, if possible, the remaining balance will be recovered from their final pay in full.
If it is not possible to recover from their final pay then an invoice will be issued upon leaving. If the employee is not currently repaying anything then ticking the checkbox confirms that you have checked this.

If the employee resigned while being off sick, I have considered whether HR need to be involved.
HR can be contacted by email at corporate.hr@sefton.gov.uk. If the employee was not off sick when they resigned, then ticking the checkbox confirms that you have checked this.

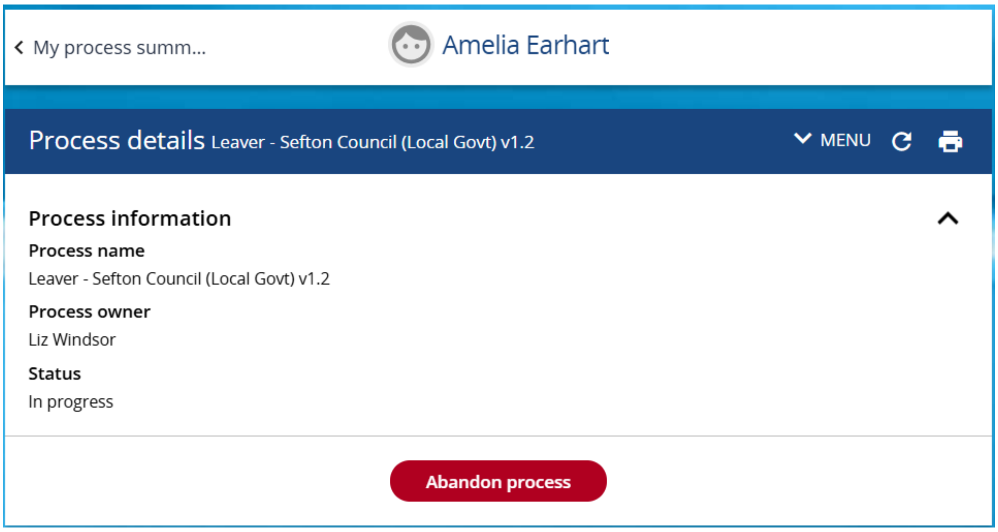
7) Click save and then click Submit Stage. **Ticking a declaration will not register when submitting the stage unless you have clicked save first.** At this point the process will be with payroll. You can confirm this by checking the process owner in the Process Information section at the top of the screen. If you are still listed as the process owner, then the Declarations stage hasn't been submitted properly.

5.2.2 Withdrawing a Leaver

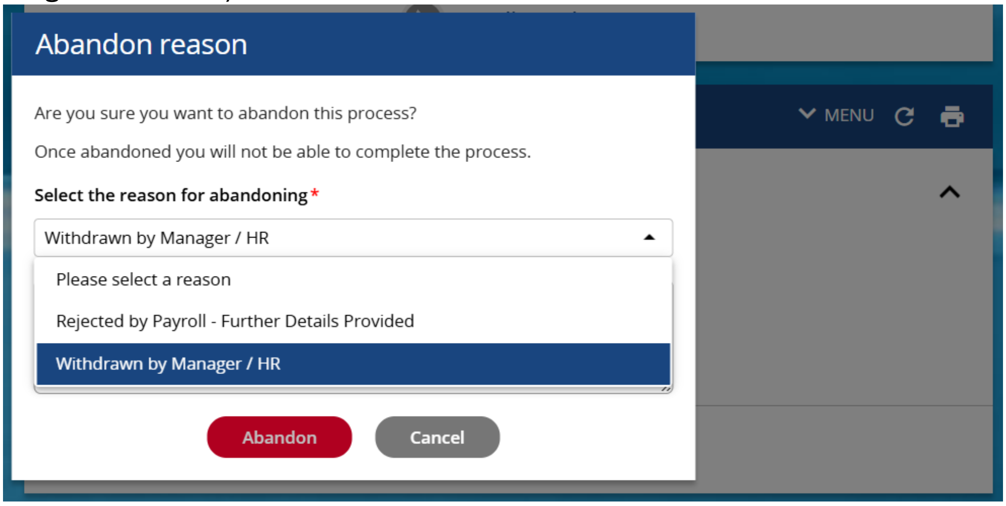
To withdraw a pending or in progress leaver:

1) If you're not already in the leaver, access it via the My Process Summary screen. See [5.1 My Process Summary](#).

2) Click the Abandon Process button in the Process Information section at the top of the screen.



3) When prompted, from the drop-down list of abandonment reasons select 'Withdrawn by Manager / HR', enter some text into the further information section (this is a mandatory field, so it can be information for yourself, or just a single character) and click the Abandon button.



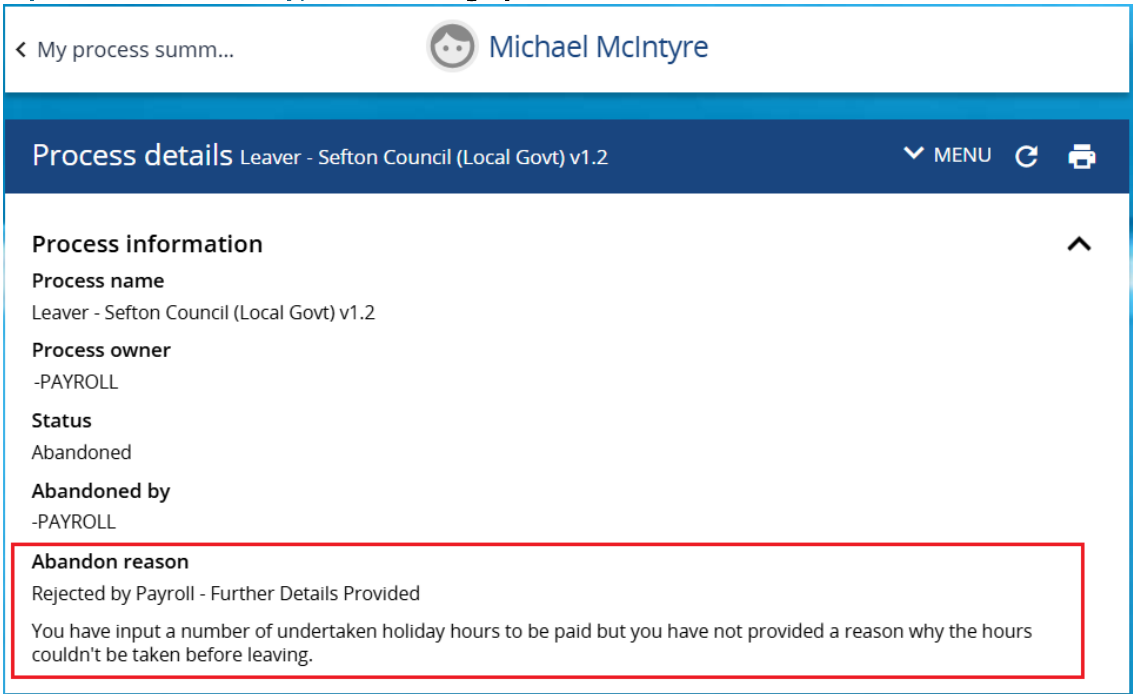
You will receive a confirmation email that the process has been abandoned.

5.2.3 Confirmation Email

When Payroll have actioned the leaver, you will receive a confirmation email confirming that the leaver has been actioned. From this point you will not be able to withdraw the leaver and must contact payroll directly with any issues.

5.2.4 Rejection Email

If there is a reason why the leaver cannot be actioned by payroll then payroll will reject the leaver with the reason 'Rejected by Payroll – Further Details Provided' and provide further details in the additional information field. You will also receive an email confirming that the leaver has been rejected. You will be able to find further details on why the leaver has been rejected from within the Process Information screen at the top of the leaver form, which can be accessed by going into My Process Summary (see 5.1 My Process Summary) and filtering by Abandoned.



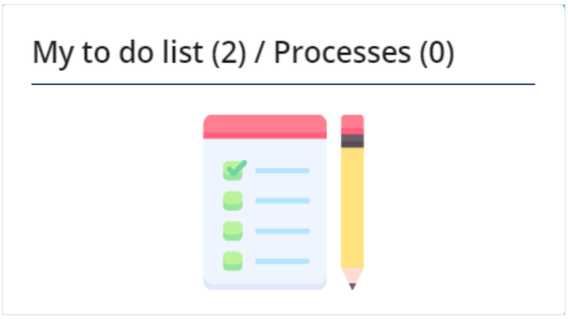
You will need to submit a new leaver process, fixing any issues that payroll highlighted.

Note: We are looking into the ability to re-activate previously abandoned process, saving the need to re-enter a lot of information. This should be added in a future release.

6. Authorisations

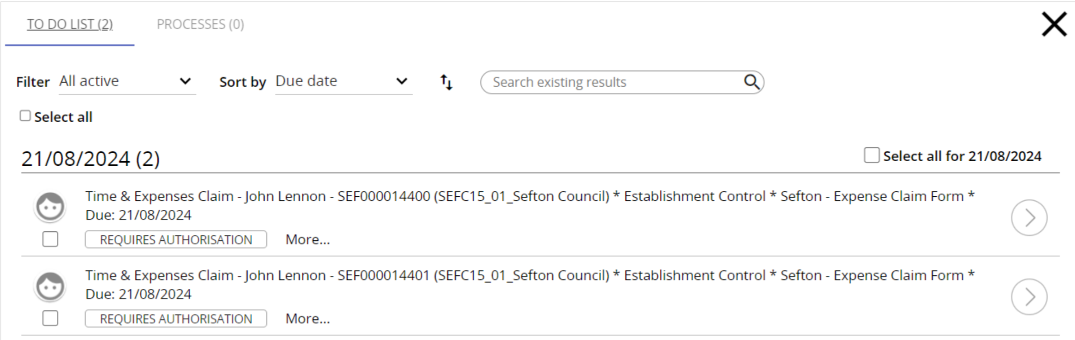
6.1 Your To-Do List

All pending authorisations live in your to-do list (see point 8 on [2.1 Home Page](#)).



An example of the home page with 2 pending items in a to-do list.

On the home page you will see a number in brackets indicating if you have anything pending. Clicking on the icon will open your to-do list.



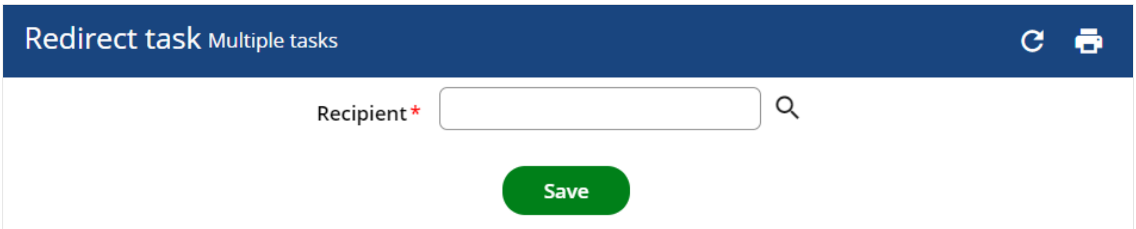
An example of a to-do list, showing 2 pending expense claims.

6.1.1 Redirecting Existing Authorisations

During periods of absence, you can set all authorisations to be redirected to another manager (see [6.3 Redirecting Authorisations](#)), however there are instances where you may need to redirect existing authorisations to another manager. This can be done directly from your to-do list by following the following actions:

1) Select the checkbox on the left-hand side of each authorisation (or clicking Select all on the top-left of the screen).

2) Once one or more authorisations are selected a redirect button will show to the right of the select all option. Clicking on this will take you to the redirect task screen.



3) Select the search icon to the left of the Redirect to field. This will open a pop-up window, where you can search for the manager by surname and select the correct manager from the results. The manager’s username will be their Personal Reference (also known as Payroll Number), so if there are multiple managers with the same name, please make sure to select the correct manager.

4) Click Save.

6.2 Authorising Expenses

Expenses that need to be authorised can be accessed by clicking on the task in your to-do list. This will take you to the relevant claim, which will include details of the employee that has submitted a claim, the authorisation status, and the details of the claim. There are 2 pages to the claim details section of the screen, Page 1, which is shown by default, shows any general expenses, and Page 2, which can be accessed by clicking Page 2, shows any car mileage. **Expenses and mileage can both be claimed on the same claim**, so it is important that you check both pages.

As a manager, you must perform the following checks before authorising a claim:

1) Check all journey and expense details are correct, and any expenses that require a receipt have the receipt attached to the claim. Receipts can be found in Document Attachments, by clicking the paperclip at the top-right of the screen, to the right of the menu button.

2) Check all expenses are being costed to the correct cost code. If the cost code is blank, then the expense will be costed to the default cost code. The cost code field is editable to you as a manager, so if you need to change or add a cost code before approving the claim then you can do.

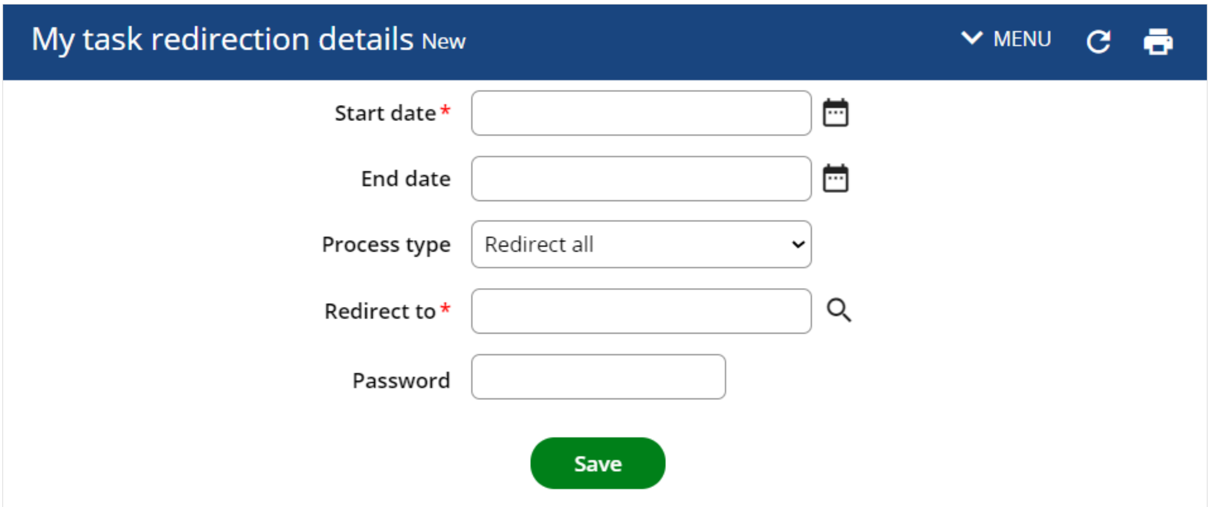
If you are happy with the claim, you can select Authorise from the Authorisation Status and click Save to authorise the claim. Alternatively, you can select Reject to reject the claim. If you are rejecting the claim, you must input a reason before saving, as this will be included in the email that the employee receives explaining why their claim has been rejected.

6.3 Redirecting Authorisations

During periods of absence, you can set any authorisations that you would normally receive (such as expense authorisations) to automatically redirect to another manager. You can do this for a set amount of time or set an open-ended date for you to manually end on your return to work.

6.3.1 Creating A Redirection

To create a redirection, navigate to **My Tasks > Redirect Tasks > My Task Redirection Details**, where you will be met with the following screen:



1) Enter the start date that you want authorisations to start being redirected.

2) If you enter an end date then authorisations will automatically stop redirecting on this day, however, if you are unsure on how long you want to redirect authorisations then you can leave this field blank and update it upon your return to work.

3) Make sure the process type is set to Redirect all (this will not be set by default).

4) Select the search icon to the left of the Redirect to field. This will open a pop-up window, where you can search for the manager by surname and select the correct manager from the results. The manager's username will be their Personal Reference (also known as Payroll Number), so if there are multiple managers with the same name, please make sure to select the correct manager.

5) Click Save.

Note: *Any existing authorisations that are with you will not redirect, so you must either deal with these yourself of manually redirect them to another manager (see* *6.1.1 Redirecting Existing Authorisations)*.

6.3.2 Ending A Redirection

When you are ready to end a redirection, navigate back to **My Tasks > Redirect Tasks > My Task Redirection Details**. In the left-hand menu you will see a list of all existing or historic redirections. Select the relevant open redirection, enter yesterday's date into the end date field (or a future date if you prefer), and click save. Any authorisations will continue to be redirected until the day after the end date, at which point they will revert to you.

Note: *Once an authorisation is sent it remains with the person it was sent to, so the manager that you delegated to deal with any authorisations on your behalf must deal with any existing authorisations or manually redirect them back to you (see* *6.1.1*

Redirecting Existing Authorisations*)*.

7. Reviews

Reviews is the area of MSS where reviews (such as Performance & Development Reviews (PDRs), 121s, and Probationary Reviews) are performed and stored PDRs for your staff.

Detailed guidance on how to use reviews can be found in MSS by navigating to **Downloads > MSS Documentation** and selecting **Professional Development**.

Alternative, if you are accessing this document through a digital device then you can access the document directly by clicking HERE.

8. Management Information

Management Information is a section in MSS that allows you to run and download pre-built management reports.

8.1 Running & Saving Reports

8.1.1 Running Reports

To run a report, navigate to **Management Information > People/Structure Reports > Run Report**. Select the report that you want to run from the list in the left-hand menu and enter the effective date as the date that you want the report to be based on. This will bring up the report parameters. Select the parameters that you want to use to run the report and click Run.

Note: *The parameters for each report are described on a report-by-report basis in the* *8.2 List of Reports* *section.*

8.1.2 Checking the Status of Reports

Some reports may take a little while to run. You will get a notification in the heading of iTrent when the report has run, as well as a confirmation email. You can also check the status of report you currently have running or have recently run by navigating to **My Profile > My Tasks And Processes**, and selecting the Processes tab. Each recently ran report will either show as Queued, Running, or Complete.

8.1.3 Saving Reports

To save a report, navigate to **Management Information > People/Structure Reports > Download Output**. Select the report that you want to save from the list to see all recently ran versions of this report. You can also access this page directly from your Processes list *(see above)* by clicking on the report name. Once here, click the download icon to open or save the report output.

8.2 List of Reports

8.2.1 People Reports

Check Details

This report lists the checks details of the selected checks held against people. A line will be returned for each of the selected checks for each person. Where a person does not have the check, the line will show ** Missing **. If only missing checks are required, this can be achieved using the 'Missing only' parameter.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Checks	See description above.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

Emergency Contact Details

This report produces a list of emergency contact details for your staff.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

Employee Contact Details

This report produces a list of contact details for your staff for a specific contact type.

Field	Comments
Address or Contact	User Preference
Address / Contact Type	User Preference
Exclude Employees With No Details	User Preference
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

New Starters

This report shows all new starters between the specified dates.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Start Date	Enter the date you want to see new starters from
End Date	Enter the date you want to see new starters to
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

People By Organisation Unit

This report lists all your staff by department along with their gender, birth date and start date.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

People Headcount

This report shows the number of staff who you have access to view, by unit, with totals for each unit and a total headcount.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Cover Pages	User Preference. If ticked, it will show a cover page with details such as the report name, run date/time, and input parameters.
Output Type	User Preference

8.2.2 Structure Reports

Headcount Analysis

This report provides headcount analysis by unit on the effective date.

Field	Comments
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Show Details	User Preference. If ticked, each employee is listed, otherwise, only sub-totals and totals are shown.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Exclude If Under 1 Years Service	User Preference
Output Type	User Preference

Movement Analysis

This report shows a dated summary (by month) of all your staff's movements, including staff joining and leaving the organisation, and staff transferring to and from the part of the organisation that you are responsible for.

Field	Comments
Start Date	The date you want to see movement from.
End Date	The date you want to see movement to.
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Show Details	User Preference. If ticked, each employee is listed, otherwise, only sub-totals and totals are shown.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Output Type	User Preference

Position And Structure Details

This report shows positions within the part of the structure that you are responsible for, including occupied positions (with employee details such as contractual hours and salary details) and vacant positions.

Field	**Comments**
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Split By Cost Code	User Preference. If ticked, in instances where a position is split over multiple cost codes, the value against fields such as contractual hours and salary will be proportional to the cost code split.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Header & Footer Pages	User Preference
Output Type	User Preference

Reporting Managers

This report shows all managers that you are responsible for, including yourself, and a list of all staff that they are responsible for.

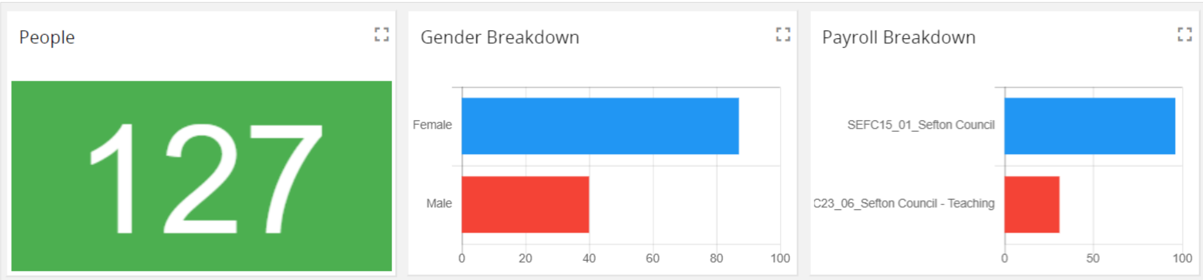
Field	**Comments**
Organisation View	Selecting Show All Data By Unit will group people by the area that they work in.
Full Path Display	User Preference. If ticked, it will show the full path for each unit.
Include Header & Footer Pages	User Preference
Output Type	User Preference

9. Insight Builder

Insight Builder is an area of iTrent where you can view pre-configured charts showing information relevant to you in an organized fashion. It is currently configured to show person and position-based information.

All areas of a chart can be windowed into with a click to show a table detailing the information relevant to the area you selected, and each row of that table can be further windowed into with a click to take you to the screens relating to the person or position that you selected. For example, clicking the Female bar on the Gender Breakdown bar chart will take you to a table of all female reportees, and clicking on Liz Windsor's row of that table will take you into Liz Windsor's record.

9.1 People (Summary)



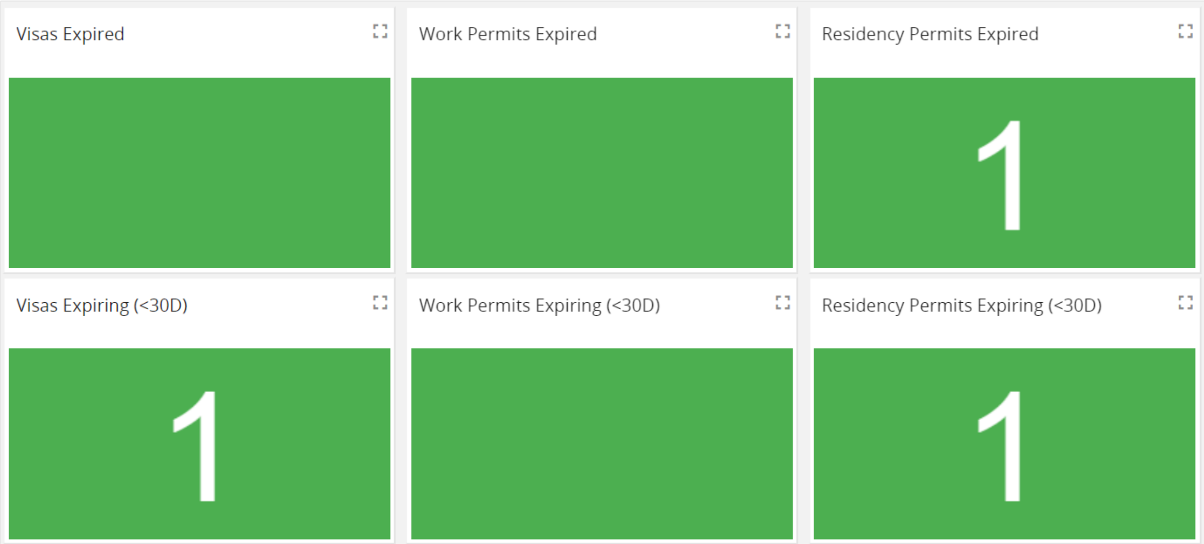
An example of the People (Summary) tab in Insight Builder.

The People (Summary) tab shows an overview of your reportees with the following charts:

- The People chart shows the number of reportees (direct and indirect) that you have. Clicking on this number will show a table view of all these people.
- The Gender Breakdown chart shows a breakdown of the gender of all your reportees. Clicking on a gender will show a table view of all people of that gender.
- The Payroll Breakdown chart shows a breakdown of what payroll all your reportees belong to. Clicking on a payroll will show a table view of all people in that payroll.

Clicking the row of any person when viewing a table view will open the Staff Summary screen for that person (see 3.1 Staff Summary).

9.2 People (Expiring Documents)



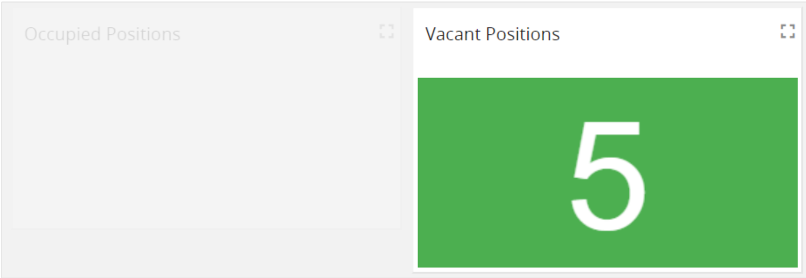
An example of the People (Expiring Documents) tab in Insight Builder.

The People (Expiring Documents) tab shows several charts relating to the expiry of key personal right to work documents. These charts align with emails that the direct reporting manager will receive (see 11.1.1 Person Expected End Dates) and it is important that these are dealt with as soon as possible.

Clicking the number on a chart will show a table view of all the relevant people. Scrolling to the right of the table will show the relevant expiry dates. Clicking the row of any person when viewing a table view will open the Staff Summary screen for that person (see 3.1 Staff Summary).

Due to processing timelines, there may be instances where documents may show as expired or expiring when you have actioned these. These can be safely ignored.

9.3 Positions (Summary)



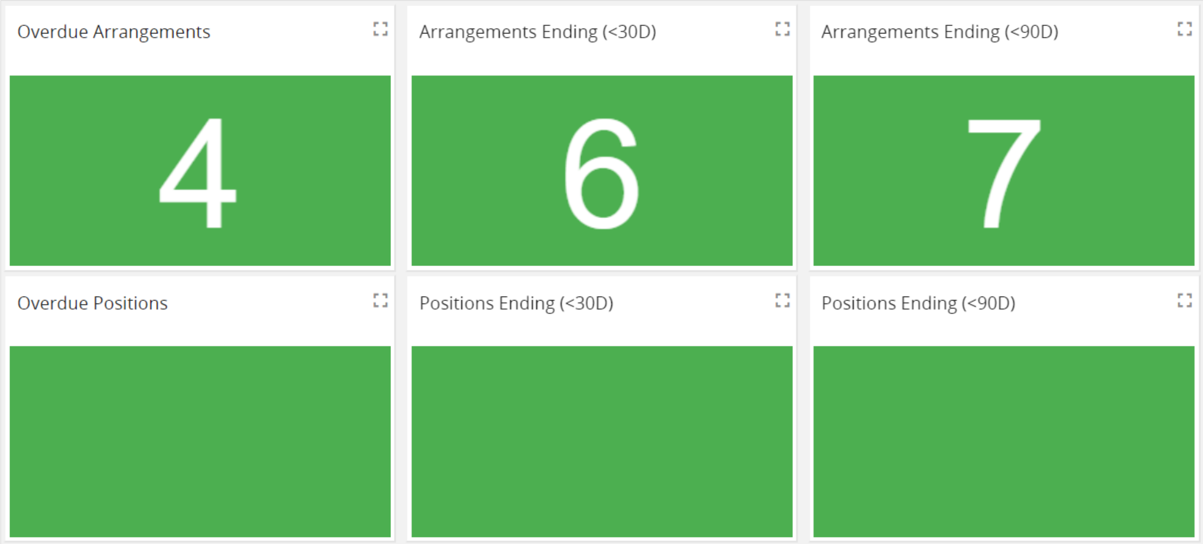
An example of the Positions (Summary) tab in Insight Builder.

The Positions (Summary) tab shows an overview of your staff with the following charts:

- The Occupied Positions chart shows all positions below you in the reporting structure. Clicking on this number will show a table view of all these positions.
- The Vacant Positions chart shows all vacant positions below you in the reporting structure. Clicking on this number will show a table view of all these positions. If you believe any of these positions are no longer funded, please contact Establishment Control.

Clicking the row of any position when viewing a table view will open the Position Summary screen for that position (see 4.2 Positions Folder). For vacant positions you can use the menu to navigate to the Position Occupancy History screen if you need help identifying what position it is.

9.4 Positions (Expiring)



An example of the Positions (Expiring) tab in Insight Builder.

The Positions (Expiring) tab shows several charts relating to the expiry of occupancy-based arrangements or positions. These charts align with emails that the direct reporting manager will receive (see 11.1.2 Position Expected End Dates) and it is important that these are dealt with as soon as possible.

- The 2 Arrangements Ending charts show any temporary occupancies or arrangements, such as a fixed-term contract or a temporary reduction in hours, that are due to expire in the next 30 days and 90 days respectively. You can find the date and reason in the expected occupancy end date and expected occupancy end reason fields in the Occupancy Details screen. It is a manager's responsibility to make sure THR/Payroll are informed of the extension of any temporary occupancies or arrangements at least a month in advance, and failing to do so will result in occupancies or temporary arrangements being ended and pay being affected.
- The Overdue Arrangements chart shows the same information as the 2 Arrangement Ending charts, but for any temporary occupancies or arrangements where the expected end date has now passed. It is important that you deal with these as soon as possible, as pay will likely already be affected.
- The 2 Positions Ending charts show any temporarily funded positions that are due to be removed from the structure in the next 30 days and 90 days respectively, for reasons such as an acting up arrangement ending, or a temporarily funded position ending. You can find the date and reason in the expected position end date and expected position end reason fields in the Position Details screen. If you believe this position is going to be incorrectly ended (e.g. the funding for it has been extended), please contact Establishment Control.
- The Overdue Positions chart shows the same information as the 2 Positions Ending charts, but for any positions where the expected position end date has now passed. These positions will be removed during the next pay period.

Clicking the number on a chart will show a table view of all the relevant positions. Scrolling to the right of the table will show the relevant expiry dates. Clicking the row of any person when viewing a table view will open the Position Summary screen for that position (see 4.2 Positions Folder). From here you can navigate to the Position Details screen to see the Expected Position End Date and Expected Position End Reason or to the Occupancy Details screen to see the Expected Occupancy End Date and Expected Occupancy End Reason.

Due to processing timelines, there may be instances where documents may show as expired or expiring when you have actioned these. These can be safely ignored.

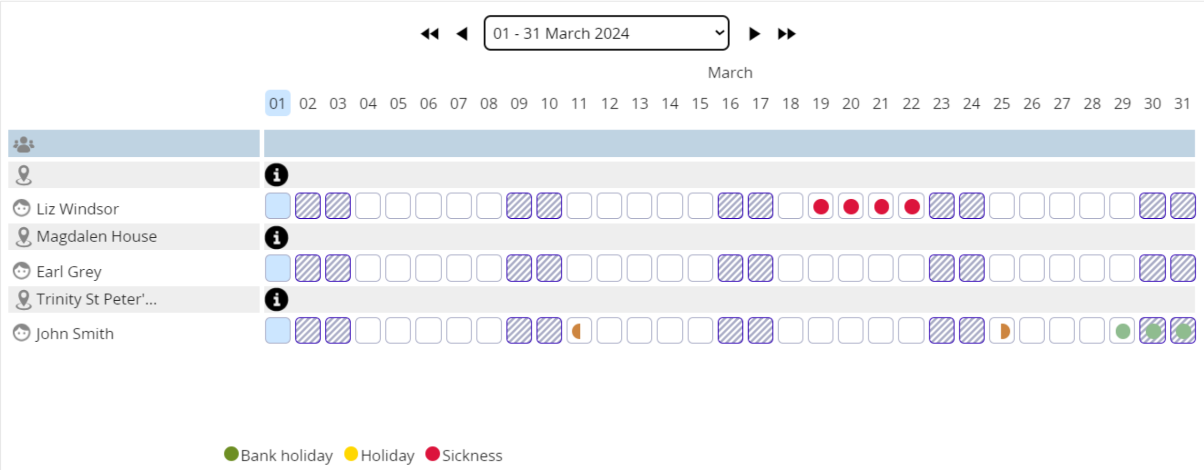
10. Reportee Calendar

10.1 Accessing the Reportee Calendar

The Reporting Calendar can be accessed from the Home Page (see point 9 on 2.1 Home Page).

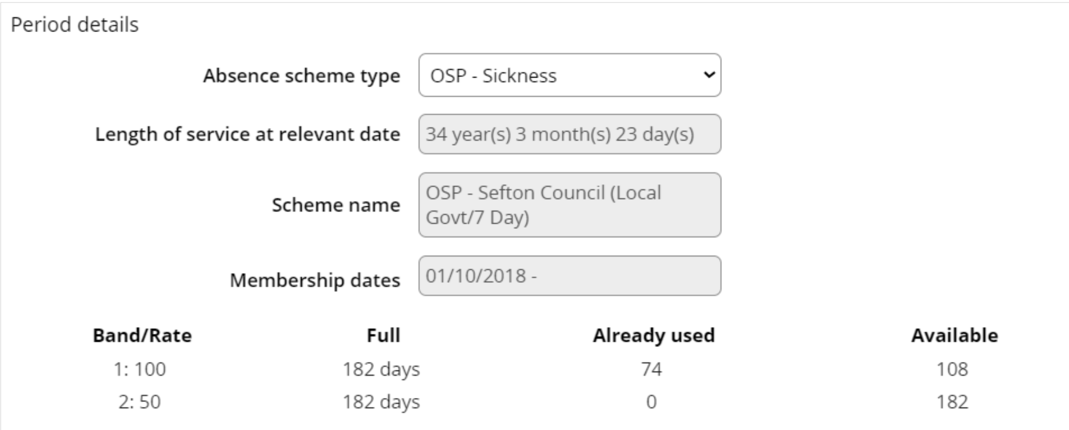
10.2 Using the Reportee Calendar

The Reportee Calendar shows a list of all staff, grouped by their work location, in a calendar view. The default view will be upcoming 31 days, however you can adjust the dates that you want to see by using the date picker at the top of the screen.



Hovering over a coloured dot will allow you to see further details on this absence, while clicking on a coloured dot will allow you to window into the absence to see further information.

Clicking on any date will allow you to window into a person's sickness entitlement screen, where you can see any sickness entitlements they have, such as full/half pay, and how much of that entitlement has been used and how much is remaining.



Period details

Absence scheme type: OSP - Sickness

Length of service at relevant date: 34 year(s) 3 month(s) 23 day(s)

Scheme name: OSP - Sefton Council (Local Govt/7 Day)

Membership dates: 01/10/2018 -

Band/Rate	Full	Already used	Available
1: 100	182 days	74	108
2: 50	182 days	0	182

An example of the Sickness Entitlement screen, with 74 days of the full-pay entitlement used.

Currently, the Reportee Calendar will only show periods of absence, such as sickness and authorized absences, and the default working pattern will be Monday to Friday for everybody. When the Time & Attendance module is launched (see 1.4 Future Roadmap) you will be able to see a true view of working patterns and bank holidays, as well as any booked flexitime and holidays.

11. Background Processes

11.1 Expected End Dates

Managers will receive both person and structure-based email notifications when expected end dates are approaching or have passed without action. More urgent notifications may include an email to HR as well.

Due to processing timelines, there may be instances where you receive a notification that you have already actioned. These can be safely ignored.

11.1.1 Person Expected End Dates

The following person-based email notification will be sent. They all align with entries in the People (Expiring Documents) tab in Insight Builder (see 9. Insight Builder).

11.1.1.1 Visas

- Visas Expired
- Visas Expiring In 30 Days
- Visas Expiring In 60 Days
- Visas Expiring In 90 Days

11.1.1.2 Work Permits

- Work Permits Expired
- Work Permits Expiring In 30 Days
- Work Permits Expiring In 60 Days
- Work Permits Expiring In 90 Days

11.1.1.3 Residency Permits

- Residency Permits Expired
- Residency Permits Expiring In 30 Days
- Residency Permits Expiring In 60 Days
- Residency Permits Expiring In 90 Days

11.1.2 Position Expected End Dates

The following position-based email notification will be sent. They all align with entries in the Positions (Expiring) tab in Insight Builder (see 9. Insight Builder).

11.1.2.1 Temporary Arrangements

- Overdue Temporary Arrangements
- Temporary Arrangements Ending In 30 Days
- Temporary Arrangements Ending In 60 Days
- Temporary Arrangements Ending In 90 Days

11.1.2.2 Positions

- Overdue Positions
- Positions Ending In 30 Days
- Positions Ending In 60 Days
- Positions Ending In 90 Days