



iTrent

iTrent Employee Self Service

User Guide



Contents

Important Security Advice	3
Getting Started and Login	3
1. Employee Self Service – Home Page.....	4
1.1 Profile.....	5
2. Personal	5
2.1 My personal details.....	5
2.2 Contact information	5
2.3 Friends & Family.....	6
2.4 Bank Details	6
2.5 Private vehicles.....	6
2.7 Qualifications.....	7
2.8 Memberships.....	7
3. My time	8
3.1 Holidays.....	8
3.1.1 Holiday balances.....	8
3.1.3 Booking holiday.....	8
3.1.4 Amending / Deleting a booked holiday.....	9
3.2 Sickness.....	9
3.3 Other.....	10
3.4 Calendar	10
4. My Pay.....	11
4.1 Payslips.....	11
4.2 P60.....	11
4.3 Time & Expenses	12
4.3.1 Mileage Claims.....	12
4.3.2 Overtime Claims.....	13
5.1. Courses	14
5.2 Learning Activities.....	16
5.3 Learning Evaluations	16
6. Performance.....	17
7. Org Chart.....	17
8. Tasks (Manager View Only).....	18

Important Security Advice

Employee Self Service (ESS) is a secure web-based application that provides a user-friendly link between you and the data that we hold on our HR/Payroll system. As iTrent ESS holds sensitive information about yourself, it is important that you use it responsibly to maintain the security of your personal information.

You should therefore always log out of ESS and never share your log-in details, as this information would allow people to access information such as your contact and pay details.

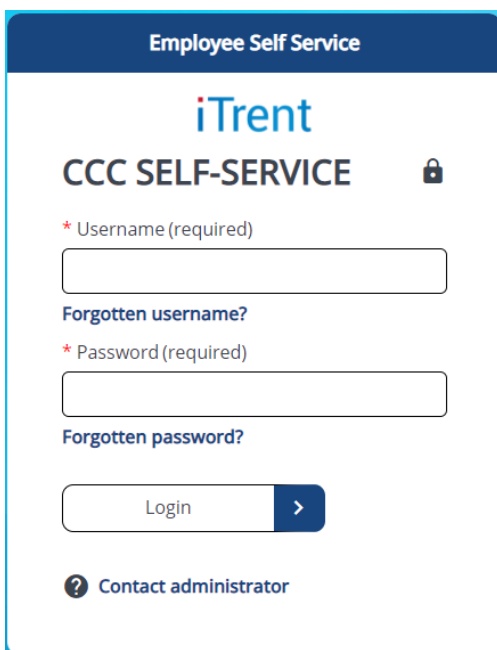
You are only able to amend certain aspects of your personal information. If you notice that any other information stored on the system is incorrect, please contact the HR Team on 01245 606440.

By using ESS, you only have access to your own details, you cannot view other employee's details and they cannot view yours. There are some areas within the Council who have access to your information and who treat your information confidentially and in accordance with data protection:

- Staff in HR, Accountancy and Audit have certain access to the information required to carry out their specific roles.
- Line managers can view position related information and certain personal details of staff who report to them via Manager Self Service.

All users, including yourself, must comply with Data Protection legislation and Chelmsford City Council policies.

Getting Started and Login



Employee Self Service is accessed through your internet browser or from a link under HR/Payroll within the intranet home page or by using the following URL:

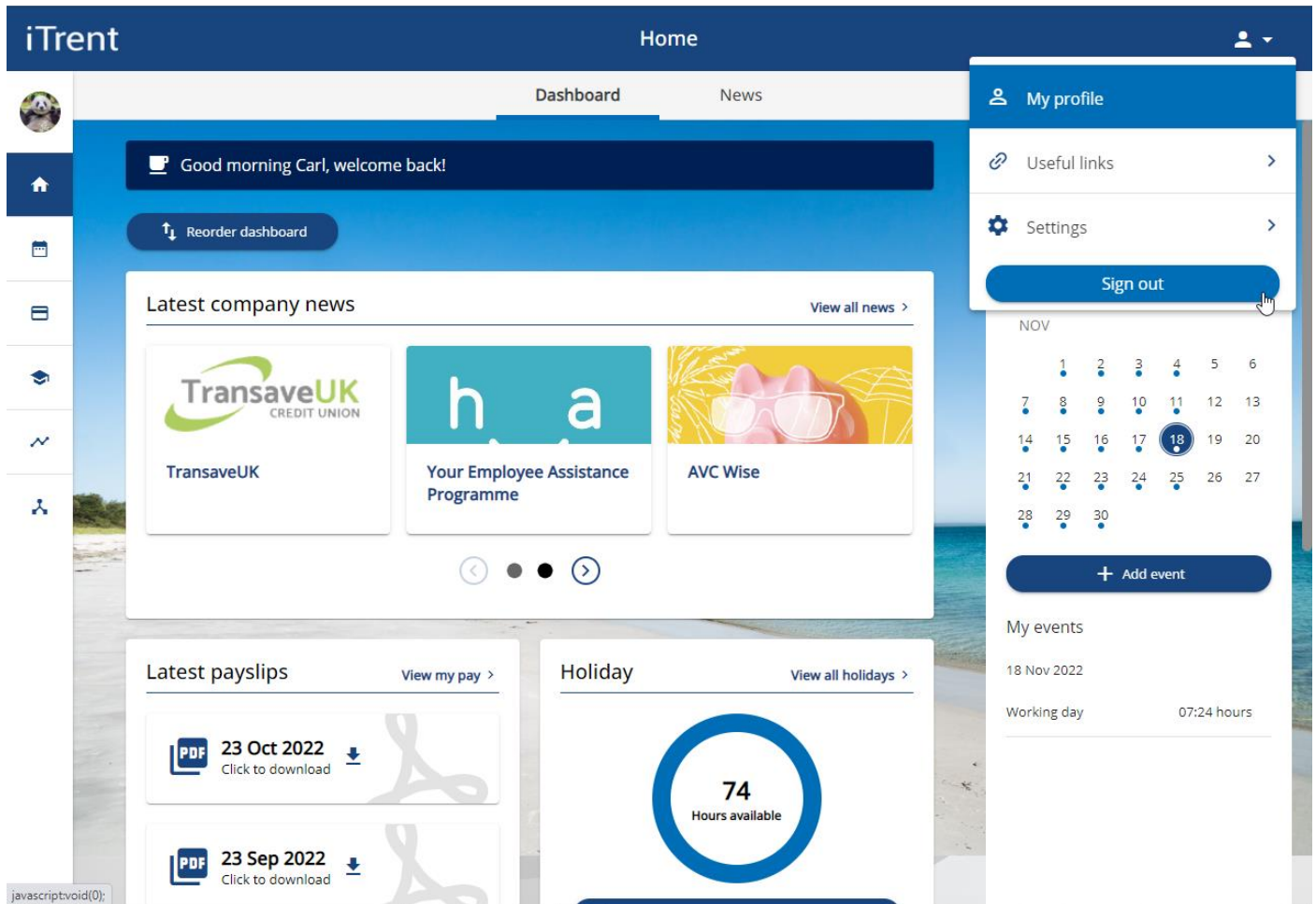
<https://www.chelmsford.gov.uk/ess>

You can add the link to your bookmarks, favourites or create a shortcut on your desktop for future access.

Username - This will be your 5-digit payroll number, if you do not know this your manager will be able to provide this to you.

Password - This must contain a capital letter and number and be at least 6 characters long (e.g. MyPassword2). For new starters HR will email your log in password usually on your start date where they will be prompted to change it when logging in for the first time.

1. Employee Self Service – Home Page

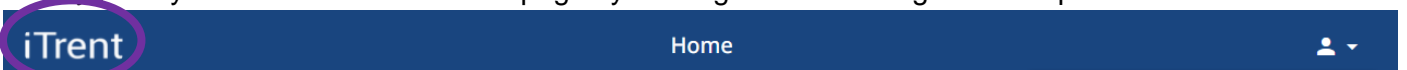


Above is the iTrent self-service dashboard, this will display links in the side panel to each section along with several information screens such as company news, payslips and holiday. These can be re-ordered and what can appear on this screen will depend on your working arrangement.

There are numerous sections in self-service which allow you to review and update your information, please see below an example of this along with the different types of information fields that appear in self-service.

<p>Preferred name</p> <input type="text" value="Carl"/>	<p>White fields These are text fields and can be modified and updated. (The blue dot indicates this is a mandatory field and must contain information to be saved)</p>
<p>* Title (required)</p> <input type="text" value="Mr"/>	<p>Drop down boxes These have pre-set options to choose from.</p>
<p>* Date of birth</p> <input type="text" value="19/02/1992"/>	<p>Grey fields These are read only and cannot be changed in self-service. If you require changes in grey fields please contact HR.</p>

At any point you can return to the homepage by clicking the “iTrent” logo in the top left-hand corner.



1.1 Profile

To access your profile, click on your photo in the top right-hand corner (or  if no photo is uploaded).

iTrent

Home



The profile shows the following options:

- My profile – Displays and allows you to amend your personal details including sensitive information, contact details, emergency contacts and bank account details.
- Useful links – Lists various links that you may find helpful
- Settings – Shows the below options:
 - **Preferences** – this allows you to change the date format and language for self-service.
 - **Memorable Information** – this allows you to reset your password without having to contact IT/HR for assistance and you are strongly advised to set this. This only works if your account is still active. Your account will deactivate after 3 consecutive failed attempts to access your account.
 - **E-Form Preferences** – this function is not currently active in ESS.
 - **Change Password** – this allows you to change your current password.
 - **Dark Mode** – Allows you to change the appearance of ESS
- Sign out

2. Personal

To access the personal details screen from the home page, select my profile from the top right drop down or click on your picture in the top left under the iTrent logo. The personal details screen is found by clicking the edit option and includes information such as name, date of birth, contact and emergency contact information, bank details and private vehicles. Some details are transferred automatically from your application form so please review these to ensure they are up to date and correct.

2.1 My personal details

This section contains the following information:

- Personal details (*Name, Title, Marital Status, Date of birth*)
- Sensitive information (*Marital Status, Religion, Ethnic Origin, Nationality, Sexual Orientation, Self-certified disabled*)
- Additional Fields (*UK Healthcare information*)

To view or change details, enter your details and click save when completed.


If you change your surname in the personal details section, HR will require a copy of the name change document (i.e., marriage certificate, deed poll etc).


2.2 Contact information


This section contains your contact information such as your home address, email address, home and phone mobile number


To view or change details in these sections click the desired detail, enter the new information and click save when completed. To update your home address or add new contact information click the add button and select “Add address” or “Add contact details”. Once you have filled in the form, click save to update your information.



Contact information

 Home - Mailing Address: 21 Duke Street, Chelmsford, Essex, CM1 1JE, United Kingdom

 E-mail address: c.pander@email.co.uk

 Home telephone: 01245678910

 Primary Mobile telephone: 07891011121

 Add Address
 Add Contact Details

- ⓘ When updating your name or home address, the Payroll team will receive a notification and inform the Local Government pension scheme however they will not notify other organisations e.g. HMRC, BUPA, UK Healthcare etc. It is your responsibility to notify them directly if appropriate.***

2.3 Friends & Family

This section contains information for who you would like us to contact in the event of an emergency. To view or change details in these sections click the desired section, enter your details and click save when completed.

To add a new emergency contact or next of kin details click the add button and select “Add emergency contact” or “Add next of kin”. Once you have filled in the form, click save to update your information.

- ⓘ It is important that we have at least one emergency contact for you in case you are involved in an accident or become seriously ill.***

2.4 Bank Details

This section contains bank account details that your salary will be paid into. To view or change details in these sections click the section, enter your details and click save when completed. If you are changing your bank details on or after the 12th of the month the change may not take effect until the next month's pay day.

- ⓘ If you receive an error message showing “Invalid Sort Code” when updating your bank details, please contact the Payroll team as this may require setting up on the Payroll system prior to use.***

2.5 Private vehicles

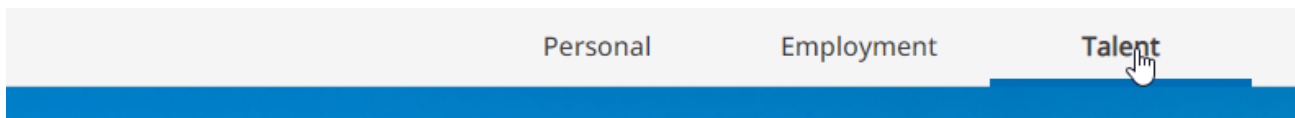
- ⓘ You will only need your vehicle details stored in self-service if you will need to make mileage claims as part of your job role.***

This section lists any private vehicles you have setup on your profile. To view details in these sections, click the desired vehicle. If you need to setup an additional car or amend the details for an existing car, please speak to your reporting manager as they will need to do this on your behalf. You will also need to show your manager your driving licence, insurance documentation and MOT (if applicable).

2.6 Employment

This tab shows your employment history, highlighting the Period(s) of employment, position(s) held and Department(s).

2.7 Qualifications



Qualifications

This section (Talent) shows any qualifications that are held on the HR system for you. If you have a qualification listed, you can view and amend the details by clicking on the relevant line.

Qualifications

All
✓ Current
Rejected

Subject	Level	Grade
Physics	GCSE	B
French	GCSE	C

If you update any details, please click the Save button, you can also add new qualifications by clicking on the “+ Add Qualification” button and entering the requested information. Click “Save” once completed to update your profile.

2.8 Memberships

This section shows any professional memberships that are recorded on the HR system. If you have a membership listed you can see and amend the details by clicking on the relevant summary card.

You can add new memberships by clicking on the “+ Add Membership button and entering the requested information. Click “Save” once completed to update your profile.

You can also attach documentary evidence by clicking on the add attachment icon and attaching the relevant document (See section 2.1 for details on this).

[← Back to Talent](#)

Membership details

* Membership (required)

Number

Level

* Start date (dd/mm/yyyy) (required)

Expiry date (dd/mm/yyyy)

Attachments

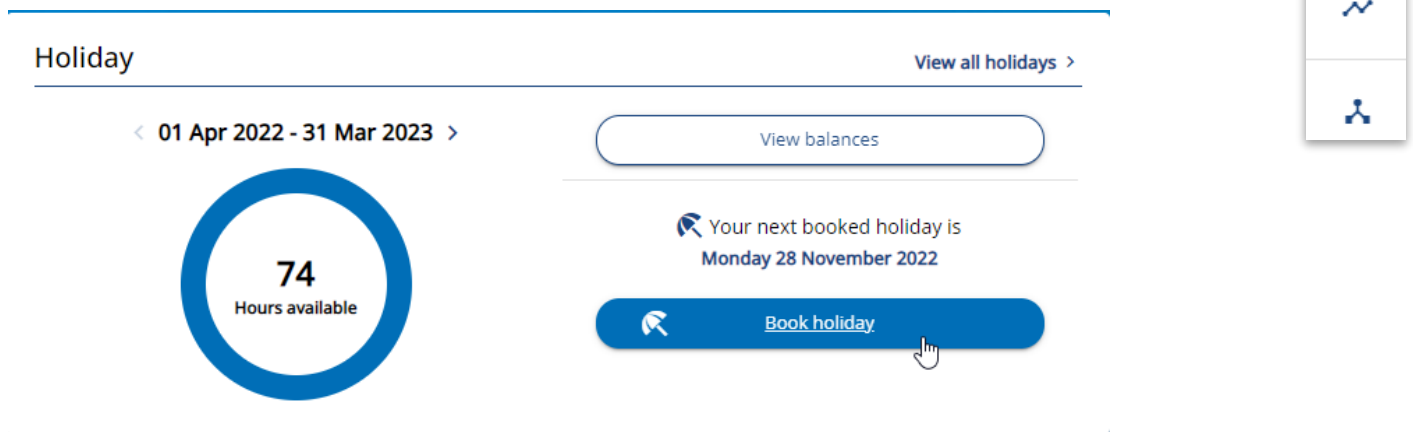
No attachments have been added

3. My time

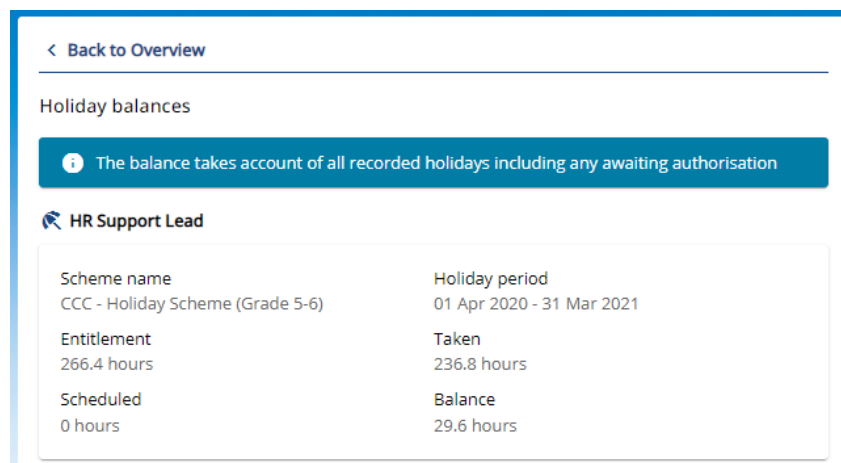
The My time section contains details of your leave and sickness records, holiday balances and enables you to make leave requests, as well as track your hours, view other absences and your calendar.

3.1 Holidays

The holiday section displays your last 12 months' holidays and any future booked holidays. It also shows you your holiday balance, in hours, including any awaiting authorisation. This section of the guide will explain how you can check your holiday balance, view your calendar and how to book a holiday.



3.1.1 Holiday balances - Click “view balances” to show your entitlement, what you have taken, scheduled holidays (future holidays that are booked but not yet taken) and your remaining holiday balance. Scheduled holidays will also include bank holidays which are booked automatically. (If you are scheduled to work on a bank holiday you will not be deducted the hours for these). These will be shown in hours.



Scheme name	Holiday period
CCC - Holiday Scheme (Grade 5-6)	01 Apr 2020 - 31 Mar 2021
Entitlement	Taken
266.4 hours	236.8 hours
Scheduled	Balance
0 hours	29.6 hours

i The balance takes account of all recorded holidays including any awaiting authorisation and will show the previous, current and next financial year's holiday balance.

3.1.3 Booking holiday

To request a holiday, click on the Add Holiday button. 

A new box will appear, the first option to choose is the “Absence type” which will be Personal holiday. Next you will be asked to choose a “Holiday period” which will be one of the options below

- Full day (*Single days holiday*)

After selecting “Full day” from the Holiday period drop down box, enter the day you wish to request in the “Start date” field along with any notes you wish to enter in the notes box for your manager to view, and then click save.

- More than one day (*More than a single day’s holiday e.g. a week off*)

After selecting “More than one day” from the Holiday period drop down box, enter the first date of the requested holiday period in the “Start date” field and then the last day of the holiday period in the “End date” field, and then click save. You also have option to start or end your holiday period as a part day using the “Full or part day” drop down box (see Part day details below)

- Part day (*A part days absence - i.e. half day or a specific number of hours in a working day*)

After selecting “Part day” from the Holiday period drop down box, enter the day you wish to request in the “Start date” field, you then have the option to enter the leave as a “morning or afternoon” in the drop down box with the same name which will be calculated as half your working hours for that day (e.g. if you work 7.4 hours per day you will be deducted 3.7 hours leave), You also have the option to specify how many hours leave of the day to take by selecting the “Specify time” option from the “Morning or afternoon” drop down menu. You then must enter how many hours leave you wish to request for that day. Once entered, click save.

After you click save you will receive email confirmation of your request, your manager will also receive an email asking them to review your request. Once the request has been reviewed by your manager you will receive an email notification to advise you if it has been authorised or not.

! If you have more than one position with a holiday scheme attached you will be able to choose which one to apply the leave request to (or both if the same day / period). This will also show previously held positions and your current role will be identified with “(Current)” in the title.

3.1.4 Amending / Deleting a booked holiday

To amend or delete a booked holiday, locate the relevant holiday period and either, click the delete icon at the bottom of the page or change the dates and click save.

[08 Jun 2022](#) [14 Jun 2022](#) [37](#) [Personal holiday](#)



A holiday details box will appear, from this you will have the options to input a new start and/or end date, once amended click save and the request will then need to be reauthorised by your manager.

You will also have the option to delete the holiday completely by clicking the delete button at the bottom of the page.

3.2 Sickness

This section shows your sickness history. To view details of the absence, click on the view all sicknesses tab which will then take you to the page below. Here you can search for a specific sickness absence period.

Type: All
 Status: Not refused

Start date (dd/mm/yyyy)
 End date (dd/mm/yyyy)

Start date ↓	End Date	Duration	Type	Position	Status	Attachments
09 Feb 2022	10 Feb 2022		Sickness	HR Support Assistant	Not applicable	

If you have returned to work after a sickness absence there may not yet be an end date entered. Your manager will update this and enter an end date or you can add this yourself. Click on the absence to view the information and enter the end date and whether the absence was a full or part day. It is also possible for you to amend the absence reason if this is incorrect. Once the information has been updated click on the Save button.

3.3 Other

This section shows other absence that can be booked for the below reasons:

- Election Duties
- External Meetings
- External Training
- Study Leave
- Time Off in Lieu
- Union Duties

Use the drop-down menus to select the correct absence type, reason and period. You will then be able to enter the start and end dates along with the duration e.g. full or part day. Once completed click the Save button.

If your manager approves your request the Authorisation status will change from Awaiting Authorisation to Authorised. If you have a Council email address, you will receive an email confirming this has been authorised.

If you wish to delete a request, you will need to speak to your manager who will be able to do this for you.

3.4 Calendar

This calendar will display your working pattern and any absence for the current month. You can change this to a day or week view by clicking on the relevant button. You can also change the current month by clicking on the Previous or Next buttons as appropriate.

If you are part of a peer group, you can also view all absence for your team by changing the Peer Group from Me Only to the relevant team. When this option is selected it will show you your team members whereabouts according to the key displayed above the calendar (see screenshot below) This is useful when you wish to book holiday and need to check if other members of your team are due to be working.

! If you are a line manager you will also have the option to select "Reportees" as a peer group and view their whereabouts for each day

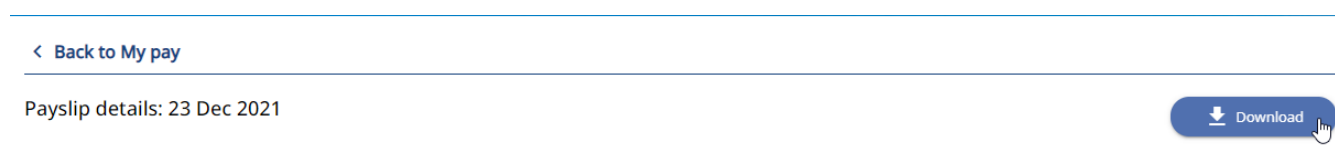
4. My Pay

The pay and benefits page includes your payslips, P60 and time and expense claims.

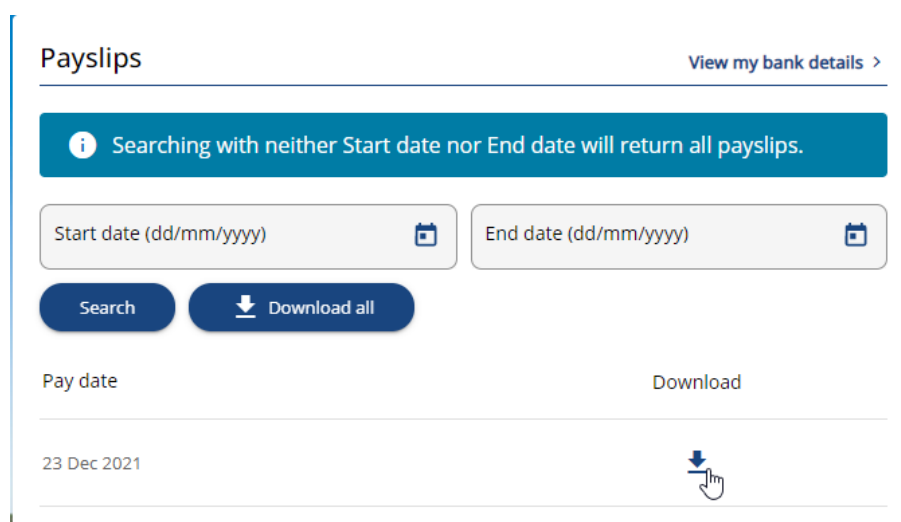
4.1 Payslips

Your previous payslips for the last 12 months will be displayed in this section. You can view your payslip by clicking on "Click to view details". You can also search previous month's payslips (over 12 months old) by pressing the "Download" button in the top right-hand corner (pictured below).

Your payslip will be displayed as below to give you an overview of your payments, benefits and deductions.

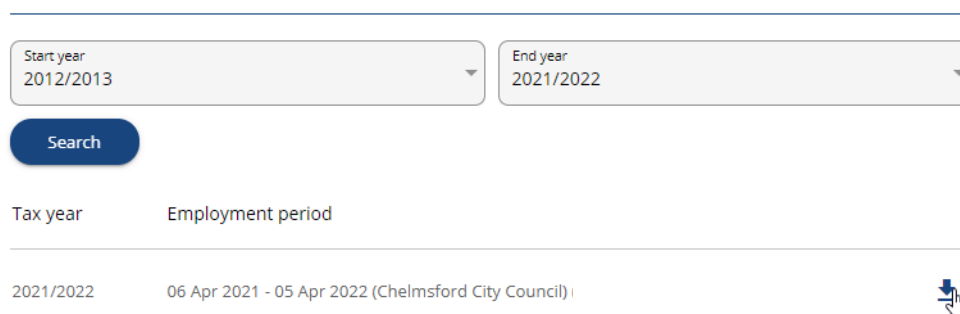


To print a copy of this click "Download" to view a more detailed, full payslip. You can then print off a copy of your payslip by using the usual print function on any document.



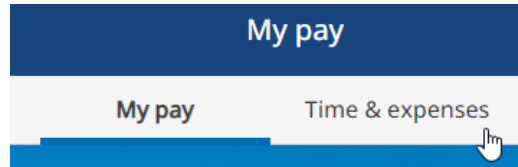
4.2 P60

In this section you can view your previous P60 documents. To view, click the desired summary card from the list, a dialog box will then pop up at the bottom of the screen (pictured in the previous section). You can then open or save your P60 to your computer if you wish.



4.3 Time & Expenses

This tab will allow you to submit claims for mileage and overtime. Any summary cards that appear in this section will include claims awaiting authorisation, saved drafts and claims that have been rejected.



To view a claim, click in the relevant summary card. To enter a new claim, click “+ Add Claim”. + Add claim

Time & expenses claim entry: New

SUBMITTING A FRAUDULENT OR DUPLICATE CLAIM
 IS A SERIOUS BREACH OF COUNCIL RULES AND WILL BE HANDLED IN ACCORDANCE WITH THE AUTHORITY'S DISCIPLINARY RULES AND PROCEDURES. THIS COULD RESULT IN DISMISSAL.

Start date (required)

Job title (required)

Claim template (required)

New

When entering a new claim, you will need to provide the following information:

Start date - This will be the earliest expense date you wish to claim for.

Job title - If you have more than one role, select the role that is relevant to the claim you are submitting.

Claim template - Select the type of claim you would like to make from the drop-down menu (Mileage or overtime).

Once you have completed these fields, click New to generate the claim form.

4.3.1 Mileage Claims

Mileage claims should be submitted in line with Chelmsford City Councils Driving Policy which can be accessed via the link below.

<https://www.chelmsford.gov.uk/new-employee-area/hr-policies/>

When submitting a mileage claim, the fields highlighted in grey are mandatory and need to be completed for each line before the claim can be submitted.

This form is for Chelmsford City Council business mileage claims ONLY.

All claims must be submitted in accordance with the Council's 'Driving Policy' - [Click here](#) to see the Policy.

Please submit your mileage claim on a weekly/monthly basis for approval by your reporting manager before the [Cut off dates](#).

Vehicle		Scheme					
<input type="text" value="KU76 FOO"/>		<input type="text" value="Lease Car for Business Use"/>					
Date	Miles	Passengers	From	To	Reason for Journey	Passenger Name(s)	
<input type="text" value="15/03/2022"/>	<input type="text" value="20"/>	<input type="text" value="1"/>	<input type="text" value="Civic Centre, Duke S"/>	<input type="text" value="Havering Town Hall"/>	<input type="text" value="Return Journey - Me"/>	<input type="text" value="Bob Kennedy"/>	<input type="button" value="x"/> <input type="button" value="+"/> <input type="button" value="-"/>
<input type="text" value="18/03/2022"/>	<input type="text" value="10"/>	<input type="text"/>	<input type="text" value="Civic Centre, Duke S"/>	<input type="text" value="Beaulieu Park Train"/>	<input type="text" value="Return Journey - Site"/>	<input type="text"/>	<input type="button" value="x"/> <input type="button" value="+"/> <input type="button" value="-"/>

Date – this refers to the date of the journey
Miles – the number of miles driven
Passengers – number of passengers if applicable
From – the location from where you started your journey
To – the location you travelled to
Reason for Journey – business reason for your journey
Passenger Name(s) – name(s) of passengers if applicable

You will need to complete a different line for each journey you take, if however, you complete a return journey to and from the same location you can add “Return Journey” in the “Reason for journey” section and enter these on the same line. You also have the options to erase, add or remove lines using the buttons as per the below:

 Erase a line
  Add new line
  Remove blank line

Once you have completed this section “Save draft” to store your claim so that you can update/add to it later. Saved drafts will show in the Time & Expenses claims screen as provisional. If you wish to submit your claim, click the “Submit” button. You will then be asked to enter your password and click “Submit” once more to confirm your submission; this will then be sent to your manager to review and authorise if possible. You can also print the form by clicking on the Print button.

i **You can extend the size of each box by double clicking them. Once extended click “Update” to save this information in the box.**

4.3.2 Overtime Claims

All overtime hours claimed must be submitted in accordance with the Council's 'Pay Policy' which is accessed via the link below.

<https://www.chelmsford.gov.uk/new-employee-area/hr-policies/>

When submitting an overtime claim, the fields highlighted in grey are mandatory and need to be completed for each line before the claim can be submitted. Overtime can be paid at plain time (Overtime @ PLAIN), which is your normal hourly rate or at 1.5 times your normal hourly rate (Overtime @ 1.5). Enter the below information against the correct rate in line with the Pay Policy.

Date – this refers to the date of the overtime
Start time – the start time of the overtime work (e.g. 13:00)
End time – the end time of the overtime work (eg. 18:00)
Reason for OT – business reason for completing overtime
Total hours – the total number of hours worked in decimal format (i.e. 2.25 hours, 3.5 hours etc.)

OVERTIME - SUBSTANTIVE (MAIN) ROLE CLAIM FORM

All overtime hours claimed must be submitted in accordance with the Council's 'Pay Policy' - [Click here](#) to see the Policy.
Please submit your claim on a weekly/monthly basis for approval by your reporting manager before the cut-off-date.

Element	Date	Start Time	End Time	Reason for OT	Total Hours		
Overtime @ PLAIN	14/03/2022	16:00	18:00	Regional Compliance Me	2.00	+	-
Overtime @ PLAIN						+	-
Overtime @ PLAIN						+	-
Element	Date	Start Time	End Time	Reason for OT	Total Hours		
Overtime @ 1.5	29/03/2022	07:30	10:30	Office Move	3.00	+	-
Overtime @ 1.5						+	-
Overtime @ 1.5						+	-

Save draft Submit Print

Once you have completed this section “Save draft” to store your claim so that you can update/add to it later. Saved drafts will show in the Time & Expenses claims screen as provisional. If you wish to submit your claim, click the “Submit” button. You will then be asked to enter your password and click “Submit” once more to confirm your submission; this will then be sent to your manager to review and authorise if possible. You can also print the form by clicking on the Print button.

When a claim has been authorised by your manager that claim will transfer from your ‘Time & Expenses’ claims list to ‘Time & Expense Claim History’. To search for previously authorised claims, click the search button (pictured on the right) and enter your desired claim dates and click search, you will then be able to view all authorised claims between this date range.

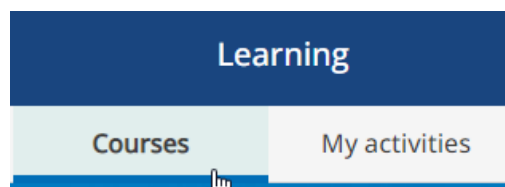


5. Learning

This section shows details of your learning events, qualifications and memberships that are held on the HR system and give you the option to view or amend this information. It also shows the waiting lists you are on for learning events, special requirements and enables you to complete learning evaluation forms.

5.1. Courses

The Courses tab allows you to search and book on to training events.



You are then able to search for a course title in the “Search for” field (or leave blank to show all courses). You also have the option to specify a date range in the start and end date fields.



Courses

Searching with neither Start date nor End date will return all courses.

All Events available

Keywords

Type

Start date (dd/mm/yyyy)

End date (dd/mm/yyyy)

Search

There is also the option to filter results to only show courses with availability. If you untick this option you can view courses that may be full however you have the option to add your name to the waiting list to be offered a place if there is a cancellation or future dates booked.

Click the search button to search for courses.

Learning activity ↑	Type	Duration	Events available
OurConversations: A Guide for Managers	HR Workshop	2 Hours	1 event 01 Feb 2023 - 01 Feb 2023 10:30 - 12:00
OurConversations: New Starter Information Session	HR Workshop		1 event 29 Nov 2022 - 29 Nov 2022 14:00 - 15:30

A list of courses will then be displayed (pictured below, left), if there is availability then dates and times will be displayed for each course. For further details click on the box for your desired course, a box will then appear (pictured below, right) with course details including the date, times, venue and a course overview.

[< Back to Courses](#)

OurConversations: A Guide for Managers

An introduction to OurConversations for Managers and Team Leaders.

This workshop will cover the OurConversations Framework and provide participants with the opportunity to ask questions about this and how it can be used.

OurConversations replaced the appraisal process at the Council and encourages regular two-way communication between individuals and their managers/team leaders.

Date ↑	Time	Tutor	Venue	Spaces
01 Feb 2023 - 01 Feb 2023	10:30 - 12:00		Chelmer Room	10

Book onto course

Add to waiting list

If none of the dates are suitable for you or a date you wish to attend is fully booked then you may wish to add yourself to the course waiting list, you can do this by clicking the “Add to waiting list” button. If you would like to book on to one of the courses on screen click the desired course. A booking form will then appear asking you for some details of the origin and reason for your request, choose these from the drop down and then click the “Save” button. Request’s will then we sent to your line manager to review and authorise is possible.

5.2 Learning Activities

This section displays future learning activities you are either booked on to or on the waiting list for. You can also view previous events by clicking the “Current” drop down menu and selecting the relevant option.

The screenshot shows the 'My activities' section of the iTrent system. At the top, there are tabs for 'Courses' and 'My activities'. Below the tabs, the heading 'Learning activities' is followed by a link 'View my talent profile >'. A blue banner contains an information icon and the text 'Searching with neither Start date nor End date will return all activities'. Below this is a dropdown menu for 'Learning activities' currently set to 'Current'. There are input fields for 'Start date (dd/mm/yyyy)' and 'End date (dd/mm/yyyy)', each with a calendar icon. A blue 'Search' button is positioned below the date fields. The main content is a table with the following columns: Event name, Status, Start date, Failed / reason, Renewal, and Cost. The table contains two rows: one for 'Uniform - document templates' (Booked, 11 Oct 2022, No) and one for 'Probation / New Starters Objectives / Induction for Managers (HR Workshop)' (Waiting list). At the bottom, there is a blue button with a plus sign and the text '+ Add personal learning'.

You are also able to add your own learning activities to your profile if you have participated in independent training not arranged by HR. To do this click the “+ Add personal learning” button and fill in the details on the form which will include the Event title, start and end date, and the learning activity type. If you have completed this learning event check the “Completed” check box.

! If you are adding your own activities remember to always add in an end date. If your event was only for one date enter the start and end date as the same date.

5.3 Learning Evaluations

The screenshot shows the 'Learning evaluations' section. At the top, there are tabs for 'Courses' and 'My activities'. Below the tabs, the heading 'Learning evaluations' is followed by a horizontal line. Below the line are several filter buttons: 'All', 'Current' (with a checkmark), 'Requires authorisation', 'Provisional', 'In progress', and 'Completed'.

This section will show learning evaluation forms for courses you have attended. To access the form, click on the relevant summary card that relates to the event evaluation you want to complete.

[Learning Event Evaluation](#) [Writing Job Descriptions \(HR Workshop\)](#) [11 Oct 2022](#) [Provisional](#)

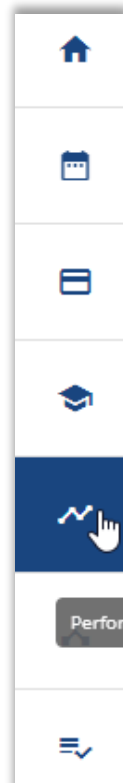
! Learning evaluation forms help the organisation work with our training suppliers to improve the content and experience of training courses delivered

This will bring up a page that asks you to ‘Start’ the evaluation form. Once you have clicked Start the evaluation form will appear. Complete the event evaluation summary by selecting a choice from each

multiple-choice question and any other open questions at the bottom. Once complete and click on the “Summary” button and then click on the “Submit” button. The following message will appear asking you to confirm. Press Ok to submit the learning evaluation form.

6. Performance

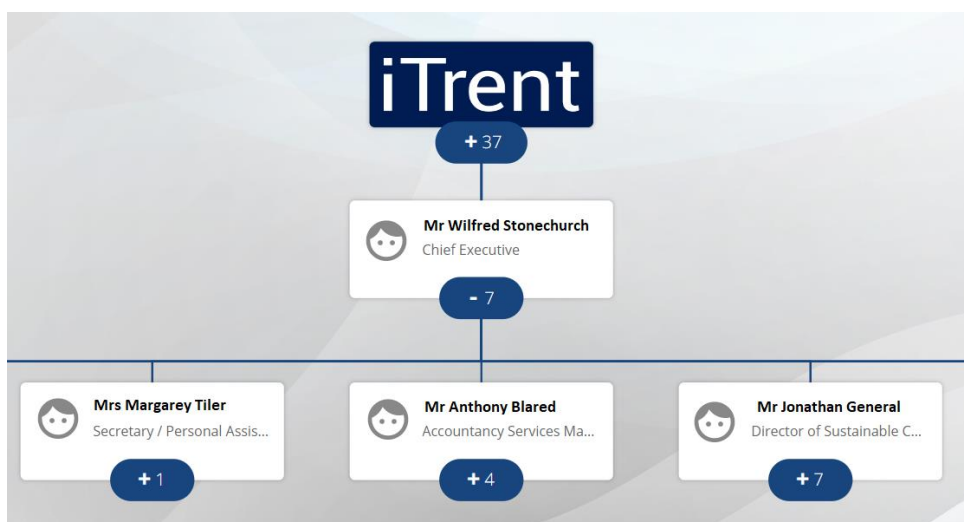
You can access the performance tab by clicking on the highlighted symbol on the left. In this section, you can see any OurConversations documentation that has been logged by your manager. OurConversations does not have to be recorded on iTrent so this may be blank if you and your manager have chosen to store documentation elsewhere.



Reviews						
Review forms						
All		✓ Current				
Form name	Start date ↓	End date	Due date	Status	Rating	Attachments
OurConversations	03 Oct 2022	31 Dec 2022		Provisional		📎

7. Org Chart

This section will display Chelmsford City Councils organisation chart and your position within this. You also have the option to navigate through the organisation chart by clicking people who are around you. You can also search for a specific person / job title by using the search bar on the top right hand side.



8. Tasks (Manager View Only)

This section will display on the self-service profiles of any user who is also set up with People Manager and will allow managers to approve their reportees leave and learning requests.

Absence requests			
Name	Type	Start date ↓	End date
Mr John Smith	Personal holiday	28 Nov 2022	28 Nov 2022

Learning requests			
No learning request details have been added yet			



Requests will appear under the relevant section (above). To view these, click on the desired summary card, this will bring up a pop-up box (below) which will display the start and end date of the leave request and also remaining leave balance (if applicable).

Absence details

Name
Mr John Smith

Type
Personal holiday

Start date (dd/mm/yyyy)
28/11/2022

End date (dd/mm/yyyy)
28/11/2022

Balance
148

*** Action (required)**
Please choose

Authorised

- Not Authorised - Insufficient balance
- Not Authorised - Insufficient notice
- Not Authorised - No cover available
- Not Authorised - Workload too great
- Request cancelled by employee
- Please choose

To action a request, select an option from the "Action" drop down box (authorised, not authorised etc.) and click save. This will then confirm to the requester the action that has been taken.

Learning requests will also appear in this section where a reportee requests to book on to a training course through self-service. As with absence requests you will also have the option to authorise or not authorise these.