

Introduction to iTrent

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How and where you can access iTrent

iTrent is a web-based system so you can access it on any internet browser using a PC, laptop, tablet, and some large screen smart phones. This means that you do not need to be on the Council network to log in to the iTrent HR system.

Security

When logging onto Employee Self Service you are accessing your own data. It is **your** responsibility to take appropriate care in keeping your data secure when using iTrent. Further information on this is available in [Data Security Advice To iTrent Users](#) on the Intranet.

If you also have Manager / Core System access then you should ensure you comply with the Information Governance Policy. Further information on this is available in [Information Governance](#) on the Intranet.

In particular, you should **never** download personal information relating to other users or employees to a non-Council or non-schools computing device.

What you will use iTrent for

Using Employee Self Service (ESS) you will:

Keep your personal details accurate and up to date, for example: your address, your contact details, emergency contact details, bank details, vehicles, etc.

- Request annual leave, flexi leave and all other types of leave
- Submit your time & expenses claims to payroll
- Request a place on a learning event
- View your payslips and P60

Using Manager Self Service (MSS) managers will:

- Approve requests for leave, time & expenses claims and learning events
- Enter employee sickness absence
- Enter employee shared conversation dates
- Review absence via manager reporting
- Redirect your tasks to another manager whilst on leave

How to log in

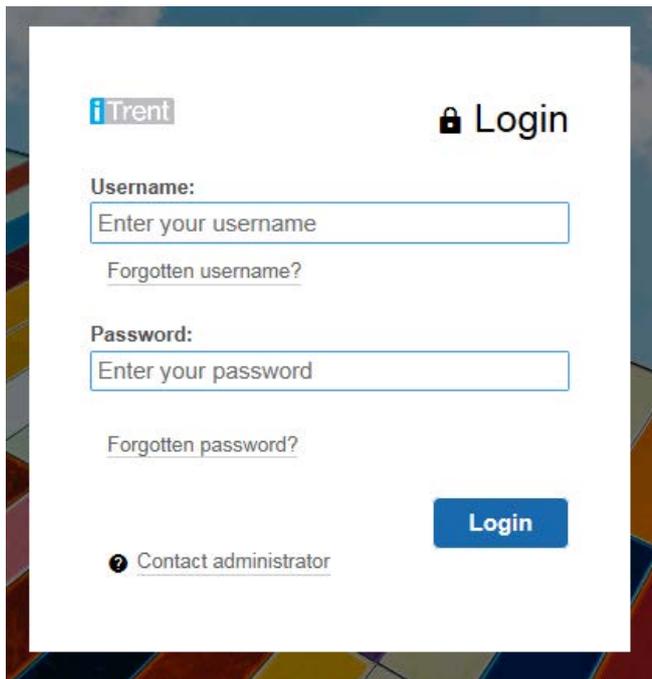
Use the following links to bring up the respective log in screens. **Note:** that managers only need to use MSS as this will provide access to both MSS and ESS.

[Employee Self Service](#)

[Manager Self Service](#)

It is recommended that you save the appropriate link as a shortcut, either on your desktop or browser toolbar; and/or as a favourite in your browser for easy future access.

The login screen will look similar to this:



The screenshot shows the iTrent login interface. At the top left is the iTrent logo, and at the top right is a lock icon followed by the text 'Login'. Below this, there are two main sections: 'Username:' and 'Password:'. Each section has a text input field with placeholder text 'Enter your username' and 'Enter your password' respectively. Under the username field is a link 'Forgotten username?'. Under the password field is a link 'Forgotten password?'. At the bottom right of the form is a blue 'Login' button. At the bottom left is a link 'Contact administrator' with a question mark icon.

Username: This will be your 6 digit employee reference number. This is on your payslip or letter of appointment, or your manager should be able to tell you.

Password: When you first login *only*, this will be:
The first letter of your surname in UPPERCASE, the last letter of your surname in lowercase, and your date of birth in the format DDMMYY; followed by the word 'Halifax' (with a Capital H)

Example: Surname is Smith and DOB is 20/11/71.

Password is: Sh201171Halifax

After your first login, you will be asked to change your password, which should:

- be between 15 and 20 characters long
- contain at least one uppercase letter, one lowercase letter and one number or symbol

Guidance on strong password construction is here: [Network Password Management Policy](#)

Note: If you are logging on from a non-council network, do not use a general web search for "iTrent" as many organisations use the software and you are unlikely to be directed to Calderdale's system.

You should use the links above, or go to the Calderdale Council website

<https://calderdale.gov.uk/v2> and search for iTrent on there as that will direct you to the specific link to our iTrent system.

The external links can be found on this page - <https://www.calderdale.gov.uk/v2/itrent>

What to do if you cannot login

New Users

Once HR Contracts & Payroll have completed processing your employment start, you will be set up with an iTrent Employee Self Service username and default password as detailed above.

If you are a new employee and are unable to login initially please email: itrent2@calderdale.gov.uk including details of your full name, employee number and start date.

This email should be used for new employee access queries only; all other existing users unable to login should contact the **ICT Helpdesk**, not the iTrent Team.

Forgotten Password

If you have previously set your User Email in Employee Self Service AND you have not entered the incorrect details more than the maximum number of times, then you can quickly and easily reset your own password.

Simply click on the 'Forgotten Password' link on the login screen and follow the onscreen instructions.

See the iTrent [Guide to Password Resets](#) on the Intranet for more information.

Locked Accounts

To prevent unlawful access to your data from outside sources, iTrent will automatically lock your account if the incorrect login details are entered 3 times.

Accounts can only be unlocked and passwords reset by the **ICT Helpdesk**. Please log requests on the ICT Helpdesk Self Service Portal in the usual way, quoting your iTrent username.

Forgotten passwords and locked accounts generate a large amount of work, so please be careful when logging in. You should ensure you have set up your User Email, and if you are unable to remember your password after 2 attempts, use the self-reset facility to avoid locking your account.

The Employee Self Service Home Screen

NAVIGATION BAR: The navigation bar allows you to access the different areas of ESS.



PREFERENCES: You can change your password and memorable information, and set your payslip preferences by clicking here

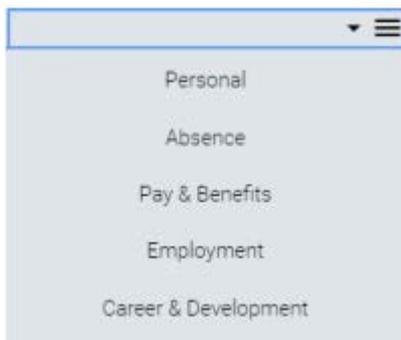
SHORTCUTS: Commonly used links can be found here.

The number displayed will automatically adapt to the device and screen size.

You can always see more shortcuts by clicking on the last option "More links from self service"

NEWS: Important news and guidance items are accessible from the links at the bottom of the screen

When viewed on mobile devices and other small displays, the headings on the main navigation bar are replaced with a dropdown menu button. Select the menu button to see the same options displayed on the desktop/laptop version of the page:



Important things you must do when you first log on

Set your User Email

This is essential for iTrent to work correctly for you. If you do not set a user email then you will not receive important notifications and it may affect the processing of your leave requests and expenses claims.

You will also be unable to reset your own password if you forget it.

To set this, navigate to the Personal tab > Contact Information > Add > Add Contact Details

Choose Contact Type = User email address

And enter your email address. This will normally be your work address, but can be another email e.g. your home email, if appropriate.

Whilst on the Personal tab, after you have saved your User email, you should check the accuracy of your information.

Click on the 'Personal' tab at the top of the page.

Click on each card icon to open up the section and check, amend (if necessary), and save your personal information.

It is your responsibility to check the accuracy of data held and make/ inform HR Contracts & Payroll of any future changes promptly.

Personal details	<p>You can amend your preferred name on this screen only.</p> <p>All other changes should be notified to the HR Contracts & Payroll Team. Any changes to marital status or name will require you to provide proof of the change to HR.</p>
Sensitive Information	<p>You can update your sensitive personal information, for example: your ethnic origin, disability status, sexual orientation, religion or beliefs.</p> <p>This data is strictly restricted and solely used anonymously for statistical monitoring purposes.</p>
Special Requirements	<p>If you are likely to have any special requirements when attending training events, you may choose to record them here.</p> <p>This will then automatically be alerted to HR Workforce Development when you book on to an event. They may then contact you to discuss any specific needs when attending an event.</p>
Contact Information	<p>In addition to setting your User email as above, you can set other contact information here. As a minimum you should have, in addition to your user email:</p> <ul style="list-style-type: none"> A home address A home telephone and/or a mobile telephone <p>You may also wish to record:</p> <ul style="list-style-type: none"> A home email A work email (if different to your user email) A work telephone <p>You can also correct your address if wrong or add a new address with an 'effective date' when moving.</p>
Emergency Contact	<p>As a minimum, you should add at least one emergency contact that can be reached during your normal working hours.</p> <p>This information would typically only be accessed in emergencies such as if you fell ill at work, or in a major incident situation to assist in establishing your safety.</p>
Bank details	<p>A summary of your current bank details will be displayed. Click onto them to open them up to see the full details. You can also update your bank details.</p> <p>Please see the iTrent Changing Your Bank Details guidance on the Intranet before making any changes.</p> <p>You may also wish to contact the HR Payroll Team especially if making the change in the week before payday.</p>
Private Vehicles	<p>Important: You must add details for your vehicle(s) if you plan to submit Time and Expenses claims for mileage.</p> <p>If you don't have a vehicle listed in iTrent, your claims will not be processed and the HR Contracts and Payroll Team are unable to override this.</p>

When you save a change to your personal data, you will normally receive a confirmation notification of the change (to your User Email address).

If you receive a confirmation of change that you have not made you should contact the **iTrent System Team** immediately.

Absence

Click on the Absence tab on the navigation bar.

The screenshot shows the iTrent Absence page. At the top, the navigation bar includes 'Personal', 'Absence' (highlighted with a red box), 'Pay & Benefits', 'Employment', and 'Career & Development'. The main content area is titled 'Absence' and shows 'Holidays: 162.8 hours available'. Below this is a table of holiday records:

Start date	End date	Duration	Type	Position	Authorisation
2 Feb 2018	2 Feb 2018	7.4	Personal Holiday	Manager	Authorised
27 Dec 2017	27 Dec 2017	7.4	Personal Holiday	Manager	Authorised
22 Dec 2017	22 Dec 2017	7.4	Personal Holiday	Manager	Authorised

Below the table is a 'Sickness' section with a message: 'No sickness details have been added yet'. At the bottom, there is an 'Other' section with two Flexi Leave records:

Start date	End date	Position	Authorisation
25 Aug 2017	25 Aug 2017	Manager	Authorised
21 Jul 2016	21 Jul 2016	Manager	Authorised

Here you can check your balances for Annual Leave, Banked Leave and TOIL.

You can also request to take various types of leave.

See the [How to Book Leave iTrent Guide](#) for more information.

Pay & Benefits

Click on the Pay & Benefits tab on the navigation bar to view and download payslips and P60s. See the [e-Payslips Guide](#) on the intranet for more information.

You can also view / submit Claims. See the [Submitting Time & Expenses Claims](#) on the intranet for more information.

Check your Employment details

Click on the 'Employment' tab at the top of the page.

Current job details

Job details

Department
Contracts and Payroll

Position reference
P14...

Position name
Manager

Personal reference
14...

Start date
22/06/2015

Payroll reference
14...

Contractual hours
29.00

Work pattern
Pattern Override 26/02/18 -

Manager
Reporting manager and job title
Miss Jen Bronze - HR Manager - Contracts and Payroll

None of the fields in the Employment screen can be updated by you. These can only be amended by HR Contracts & Payroll or your manager.

Note that the Start Date may not be earliest date you began your current job, as it can be affected by restructures and other system changes. If any other information is incorrect you should speak to your manager in the first instance.

In particular you should check the following:

<p>Contractual Working Hours</p>	<p>If these are not correct, inform your manager. It is vital that these are right as they affect your leave entitlement and any other absences that you may have.</p>
<p>Reporting Manager</p>	<p>This determines who all your leave requests and expenses claims will go to for authorisation. If you have more than one job role, you will have more than one employment to check and your reporting manager may be different per role.</p>

Further Support

More User Guides and Frequently Asked Questions are available on the [iTrent intranet](#) page. If you simply aren't sure how to do something, please check the [Guides](#) page first.

For Password Resets and unlocking User Accounts – please contact the [ICT Helpdesk](#)

For Payroll Queries - please contact HR Contracts & Payroll:
contracts&payrollteam@calderdale.gov.uk

For iTrent System Queries - please log a case on the [ICT Helpdesk Self Service Portal](#)

Urgent System Problems – Email iTrent2@calderdale.gov.uk or call the iTrent Team on (01422 28) **8314**