



# School Business Manager Guide

Version 1

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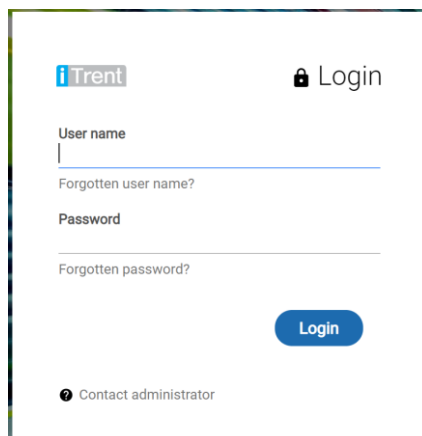
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## 1. Logging In

The School Business Manager web address is:

[http://hr.rbwm.gov.uk/tlive\\_web](http://hr.rbwm.gov.uk/tlive_web)

When you access the School Business Manager website, you should see the following login screen:

The image shows the iTrent login interface. At the top left is the iTrent logo. To the right is a 'Login' button with a lock icon. Below the logo are two input fields: 'User name' and 'Password'. Each field has a 'Forgotten' link below it. A blue 'Login' button is positioned to the right of the password field. At the bottom left, there is a link that says 'Contact administrator' with a question mark icon.

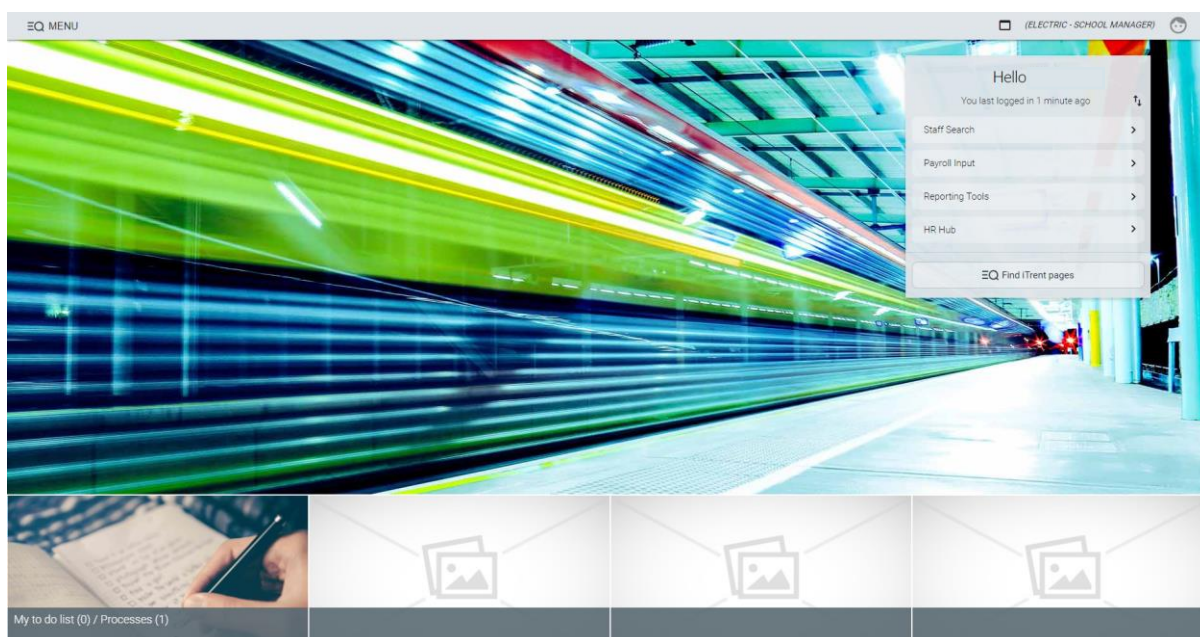
Please use your login details provide to access the iTrent site.

If you have the following issues, please click on the link below to view each areas content in more detail:

1. [Forgotten Password](#)
2. [Forgotten Memorable Password](#)
3. [No Login Details](#)

## 2. Home Page

When you log in you will see the homepage:

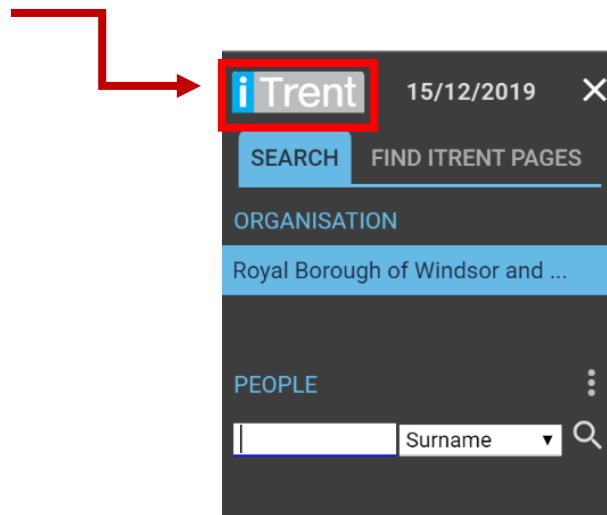


The navigation options are below, please click on the link to view each areas content in more detail:

1. [Staff Search](#)
2. [Fast Input](#)
3. [Reporting Tools](#)
4. [HR Hub](#)

### 3. Navigation

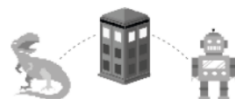
If you want to return to the main menu/homepage, you will need to select the top left-hand logo of iTrent.



#### 3.1. Effective Date

The majority of information in iTrent is date effective. As you navigate through the system you will frequently be prompted to enter the date you want to view information. Alternatively, you can select the arrow next to 'dd/mm/yyyy' and select the correct date.

##### Effective date

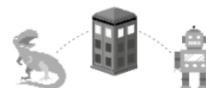


Please enter the date you wish to view or edit this information from.

17/12/2019 x

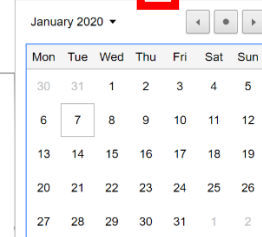
OK CANCEL

##### Effective date



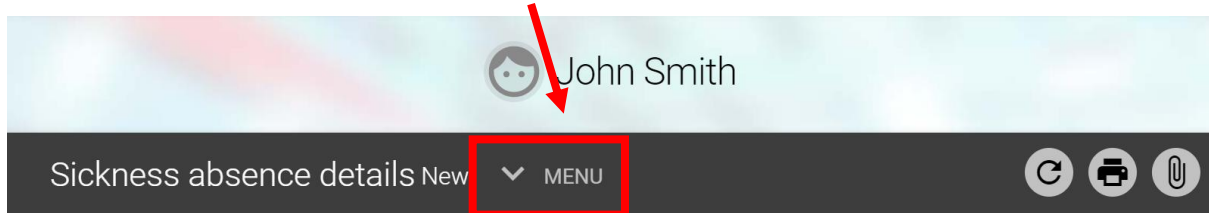
Please enter the date you wish to view or edit this information from.

dd/mm/yyyy

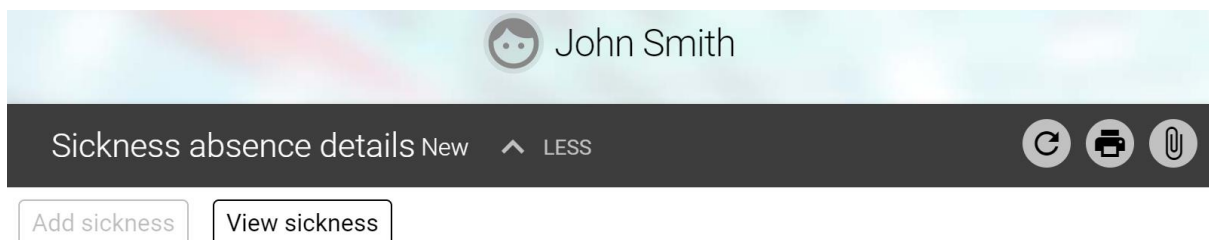


### 3.2. Navigation within a folder

If you would like to navigate to another link in the same folder, select the 'Menu' arrow at the top in the banner (as seen in the image below).

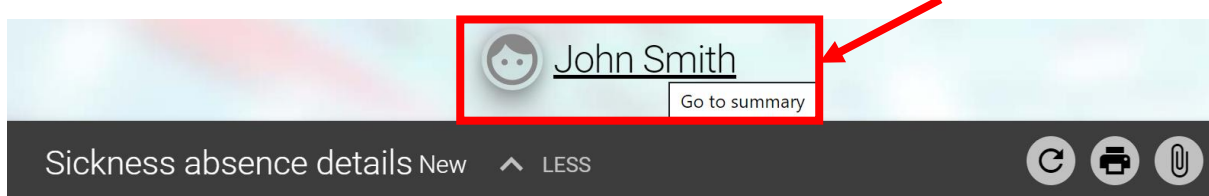


This will show you the same links within the folder (as seen on the summary card page). When you select the 'Menu' option, you can navigate to the other links in the folder.




### 3.3. Navigation back to Summary Card

If you would like to navigate back to the individual summary card, please select the underlined name at the top of the page (as seen in the image below with the red box).



### 3.4. Blue Dots

If there is a small blue dot , it means the criteria is essential to input or select.

Organisation start point 	Royal Borough of Windsor and Maidenhead	
--	---	---

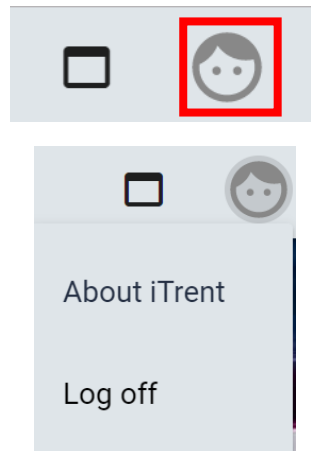
### 3.5. Tabs

The tabs allows you to have more than one iTrent page open at the same time. If you select this, it will bring up another tab. When a new tab appear, it will present the homepage again.



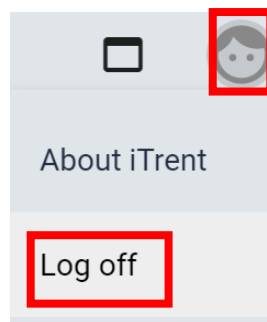
### 3.6. Profile Button

The face icon is your profile button and it will give you the options to 'Log Off'. If you have multiple profiles these will be listed here and you will be able to select which profile you would like to use.



### 3.7. Logging Out

To log out of iTrent, please click on the face icon and select 'Log off'.



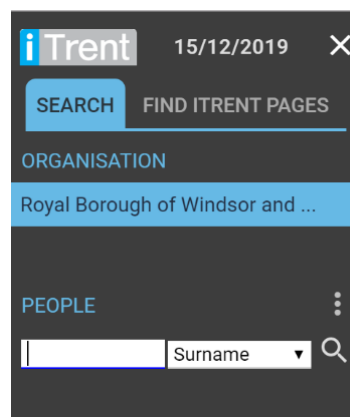
## 4. Staff

This section details information related to the employees in the line management or supervision area, for your role. If you do not see a staff member, please [contact](#) the iTrent Team.

### 4.1. Searching People

When you select the Staff option, the side bar will come up with the organisation '**Royal Borough of Windsor and Maidenhead**'. The drop-down box allows you to select various pieces of information to search against an individual. These are listed below;

- Forename
- Job Title
- Organisation Unit
- Payroll
- Payroll Reference
- Personal Reference
- Pos Occ Reference
- Previous Surname
- Social Security Number
- Staff Identifier
- Surname



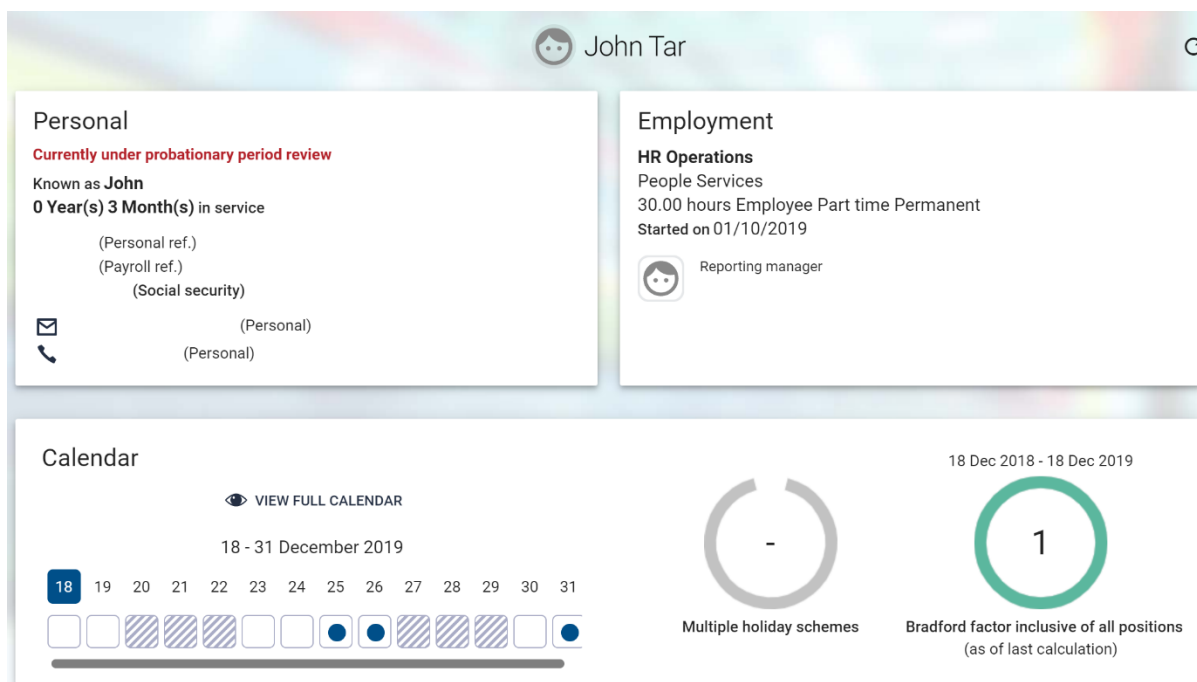
If you select the drop-down box and 'Surnames', then type in 'Smith', the search will find anyone you have privileges to view with the surname of 'Smith'.

### 4.2. Summary Cards

When you select an individual, a Summary Card appears in the main area of the screen. This summary card will contain several pieces of information about an individual including:

1. Date of birth
2. Address
3. National Insurance Number
4. Job Title/s
  - a. Multiple jobs are included
5. Salary
6. Grade
7. Start Date of the current job role

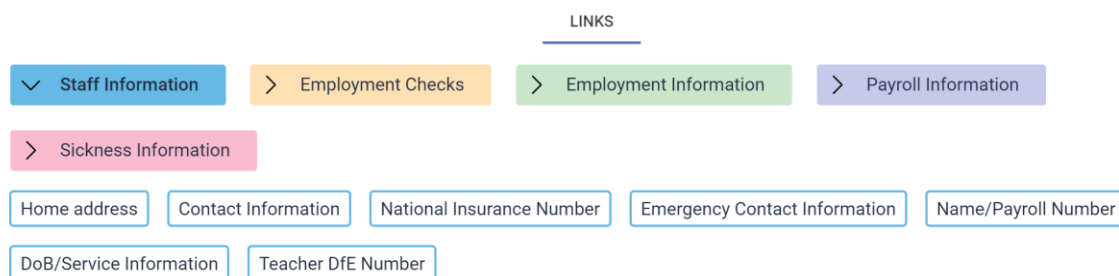




Underneath the summary card, there are several options, known as folders. When you click a folder, it shows links related to that folder (i.e. The 'Staff Information' Folder contains 'Home Address' link).

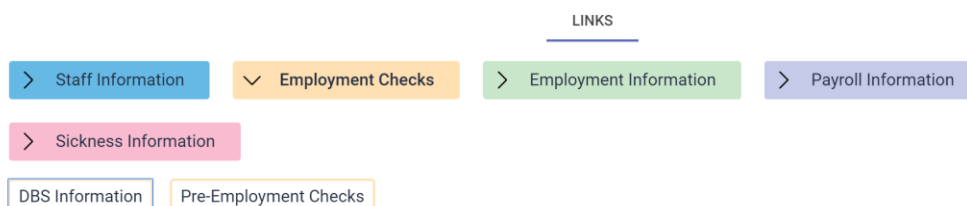
#### 4.3. Staff Information

After searching for a staff member, select the 'Staff Information' section. This will bring up the following links;



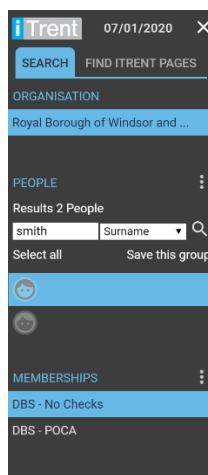
#### 4.4. Employment Checks

After searching for a staff member, select the 'Employment Checks' section. This will bring up the following links;



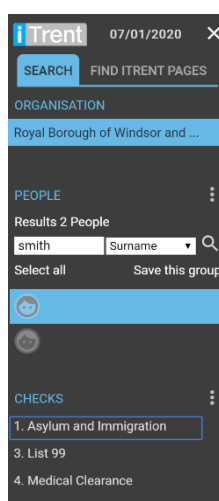
#### 4.4.1. DBS Information

When selecting this option, the side bar will re-appear with the staff members name and a new option will appear on the bottom detailing the different DBS checks.



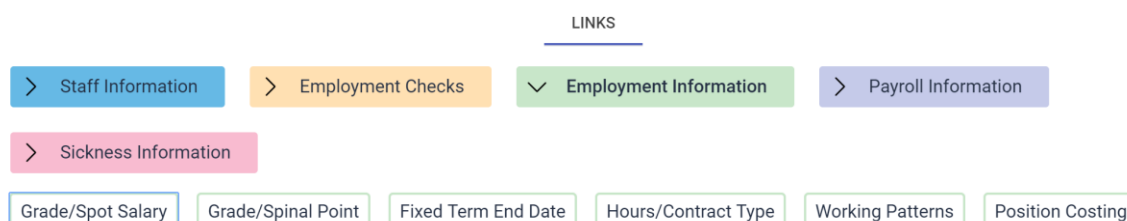
#### 4.4.2. Pre-Employment Checks

When selecting this option, the side bar will re-appear with the staff members name and a new option will appear on the bottom detailing the different pre-employment checks they have had.



#### 4.5. Employment Information

After searching for a staff member, select the 'Employment Information' section. This will bring up the following links;



For each link as mentioned above, you will need to select the specific job if they have multiple jobs (the side bar will re-appear to see this information). Otherwise, if the individual only has one position, the link will appear once the option has been selected.

## 4.6. Payroll Information

After searching for a staff member, select the 'Payroll Information' section. This will bring up the following links;

LINKS

[> Staff Information](#) [> Employment Checks](#) [> Employment Information](#) [> Payroll Information](#)

[> Sickness Information](#)

[Enter Mileage Claim](#) [Previous Mileage Claim](#) [Temporary Payments in Period](#) [View Payslip](#) [Contractual Allowances](#)

### 4.6.1. Enter Mileage Claim

Mileage Claims can be seen under the folder 'Payroll Information'.

When selecting this option, the mileage expense detail form will appear automatically.

Mileage expense claim details New MENU

Claim date

Status New

Claim date

Job title

Vehicle details

Vehicle registration

Scheme fuel type

Claim details

Miles/Days claimed Miles

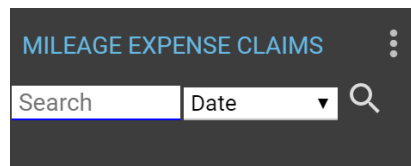
SAVE

<b>Status</b>	This should be set as New.
<b>Claim Date</b>	This should be completed in all instances and should be the first date of the claim.
<b>Job Title</b>	This should be set as the current job. Where a staff member has more than one job, the option to select which job, will be displayed.
<b>Vehicle registration</b>	<b>UNSURE HOW TO DESCRIBE. Vehicle Registration will appear automatically as the vehicle input previously.</b>
<b>Scheme fuel type</b>	This should be set as Petrol – Receipts.
<b>Miles/Days Claimed</b>	Input the number of miles/days.
<b>Miles/Days</b>	Select Miles or Days.

### 4.6.2. Previous Mileage Claim

Select 'Previous Mileage Claim' under 'Payroll Information' on the Summary Card Page.

The side bar will appear with the below image:

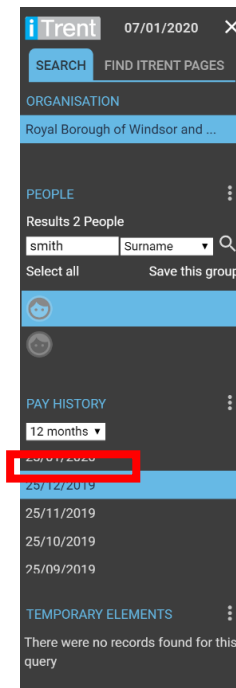


Use the magnifying glass to bring back all historic claims. Otherwise enter a date if that claim date is known, or use the 3 dots to open an advanced search. If there are any mileage claims before, it will appear underneath the 'Date' section. Please select this and view the previous mileage claim.

#### 4.6.3. Temporary Payments in Period

Select 'Temporary Payments in Period' under 'Payroll Information' on the Summary Card Page.

The side bar will reappear with the below image.

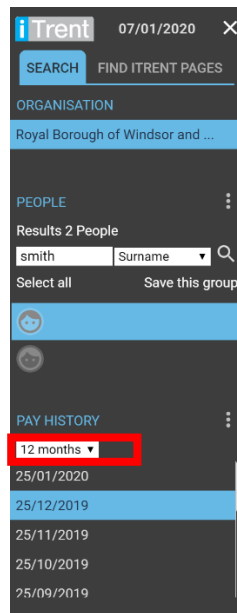


'Pay History' will appear with the selected length of time as seen on the red box above. If there are any 'Temporary Elements', it will be under each pay detail, if they have any.

#### 4.6.4. View Payslip

Select 'View Payslip' under 'Payroll Information' on the Summary Card Page.

The side bar will reappear with the below image.

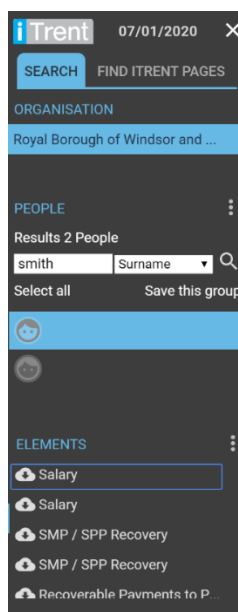


'Pay History' will appear with the selected length of time as seen on the red box above.

#### 4.6.5. Contractual Allowances

Select 'Contractual Allowances' under 'Payroll Information' on the Summary Card Page.

The side bar will reappear with the below image.



'Elements' will appear underneath the individual name.

#### 4.7. Sickness Information

After searching for a staff member, select the 'Sickness Information' section. This will bring up various links including;

LINKS

> Staff Information

> Employment Checks

> Employment Information

> Payroll Information

✓ Sickness Information

Add New Sickness

View Sickness History

Absence calendar

#### 4.7.1. Add New Sickness

To add a new sickness period, select the 'Sickness Information' folder and click the 'Add New Sickness' link.

When this has loaded, the screen is as follows:

Sickness period  
 Sickness period • More than one day ▼

---

Absence start  
 Absence start date •  📅  
 Absence start type Full day ▼

---

Absence end  
 Absence end date  📅  
 Absence end type Full day ▼  
 Expected end date  📅

---

Absence  
 Absence type •  ▼ Set as default ☐  
 Absence reason • <None> ▼  
 Hide absence reason ☐

SAVE

You will need to select the correct 'Sickness Period', the options are; [More than One Day](#), [Part Day](#) and [Full Day](#). For each option there will be different choices as shown below.

In the case of multiple jobs for an individual, the system will apply the sickness to all jobs as a default. If this is not the case, you will need to select the specific job, the sickness applied to. You can do this on the 'New Sickness Absence' Screen.


#### 4.7.1.1. More than One Day

Sickness period

Sickness period More than one day ▼

---


Absence start

Absence start date  


Absence start type Full day ▼

---

Absence end

Absence end date  

Absence end type Full day ▼

Expected end date  

---

Absence





Absence type  ▼ Set as default ☐

Absence reason <None> ▼

Hide absence reason ☐

**SAVE**

For the 'More than one day' option', you will need to complete the following items:

<b>Sickness Period</b>	This should be set to more than one day.
<b>Absence Start Date</b>	This should be completed in all instances and should be the first date of the sickness.
<b>Absence Start Type</b>	This will default to Full Day and can be changed to 'Part Day'.
<b>Absence Start Time (Part Day)</b>	<b>LEAVE BLANK IN ALL CASES</b>
<b>Hours Absent (Part Day)</b>	<p>Input the amount of hours sick. Please find the example below.</p> <div data-bbox="880 1285 1299 1500"> <p>Absence end date <span></span> </p> <p>Absence end type <span>Part day</span> ▼</p> <p>Absence end time <span></span></p> <p>Hours absent <span></span></p> <p>Expected end date <span></span> </p> </div>
<b>Absence End Date</b>	This should be the end date of the sickness, if known. If absence end date is not known, please leave blank. This is known as an open-ended absence.
<b>Absence End Type</b>	This will default to Full Day and can be changed to 'Part Day'.
<b>Absence End Time (Part Day)</b>	<b>LEAVE BLANK IN ALL CASES</b>
<b>Hours Absent (Part Day)</b>	<p>Input the number of hours sick.</p> <div data-bbox="880 1812 1299 2027"> <p>Absence end date <span></span> </p> <p>Absence end type <span>Part day</span> ▼</p> <p>Absence end time <span></span></p> <p>Hours absent <span></span></p> <p>Expected end date <span></span> </p> </div>


<b>Expected End Date</b>	For open ended absences, enter the expected end date of the sickness.
<b>MULTI-JOBS</b>	Where a staff member has more than one job, the option to select which job, will be displayed.
<b>Absence Type</b>	There are only two options; Sickness and Industrial Injury.
<b>Set as Default</b>	Please ignore this field.
<b>Absence Reason</b>	Please select the most relevant reason for the absence.
<b>Hide Absence Reason</b>	Please ignore this field.

#### 4.7.1.2. Full Day


Sickness period

Sickness period Full day ▼

Absence start

Absence start date  

Absence end

Expected end date  

Absence

Absence type  ▼ Set as default ☐

Absence reason <None> ▼

Hide absence reason ☐

**SAVE**

For 'Full Day' sickness, you will need to only input the start date and select the absence type and reason:

<b>Sickness Period</b>	This should be set to Full Day.
<b>Absence Start Date</b>	This should be completed in all instances and should be the first date of the sickness.
<b>Expected End Date</b>	For open ended absences, enter the expected end date of the sickness.
<b>MULTI-JOBS</b>	Where a staff member has more than one job, the option to select which job, will be displayed.
<b>Absence Type</b>	There are only two options; Sickness and Industrial Injury.
<b>Set as Default</b>	Please ignore this field.
<b>Absence Reason</b>	Please select the most relevant reason for the absence.
<b>Hide Absence Reason</b>	Please ignore this field.




#### 4.7.1.3. Part Day

Sickness period

Sickness period Part day ▼

---

Absence start

Absence start date  

Absence start type Part day ▼


Absence start time

Hours absent

---

Absence end

Absence end time

Expected end date  

---

Absence

Absence type  ▼ Set as default ☐

Absence reason <None> ▼

Hide absence reason ☐

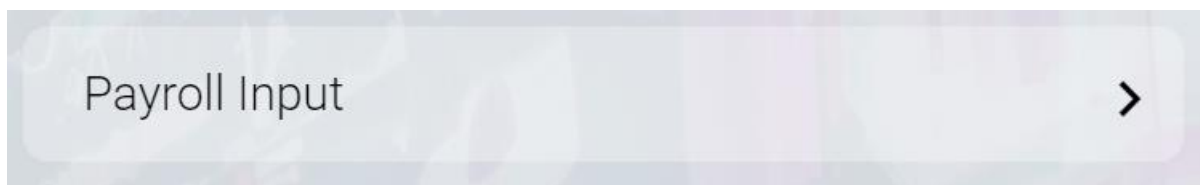
**SAVE**

<b>Sickness Period</b>	This should be set to part day.
<b>Absence Start Date</b>	This should be completed in all instances and should be the first date of the sickness.
<b>Absence Start Type</b>	This will default to 'Part Day'
<b>Absence Start Time</b>	<b>LEAVE BLANK IN ALL CASES</b>
<b>Hours Absent</b>	Input the number of hours sick. Please find the example below.
<b>Absence End Time</b>	<b>LEAVE BLANK IN ALL CASES</b>
<b>Expected End Date</b>	For open ended absences, enter the expected end date of the sickness.
<b>MULTI-JOBS</b>	Where a staff member has more than one job, the option to select which job, will be displayed.
<b>Absence Type</b>	There are only two options; Sickness and Industrial Injury.
<b>Set as Default</b>	Please ignore this field.
<b>Absence Reason</b>	Please select the most relevant reason for the absence.
<b>Hide Absence Reason</b>	Please ignore this field.

## 5. Payroll Input

Payroll Input is where you enter timesheet information for processing to payroll on behalf of your school. You may also know it as Fast or Temporary input. You can also enter sickness for a staff member from these areas as well as via the staff search option.

On the Homepage, click the section called 'Payroll Input' (as seen in image below).








After the page loads, the side bar will appear, several different timesheet options will appear. These are;

- [Ad Hoc Payments](#)
- [Additional Hours – Non-Teaching](#)
- [Additional Hours – Teaching](#)
- [Relief – Non-Teaching](#)
- [Training Expenses](#)
- [Travel Expenses](#)

You will need to click a timesheet (on the left-hand side bar on iTrent) and then select 'Timesheet Details'. The form will open across the whole screen.

The forms will display the below information, please use the table to familiarise yourself on what each field does:

<b>Payroll</b>	Select the payroll from the dropdown list, there will only ever be one option.
<b>Payment date</b>	This will <i>automatically</i> populate once you select the payroll.
<b>Date earned</b>	<p>This will <i>automatically</i> populate once you select the payroll.</p> <p>Change this to the end of the most recent claim period, for example for claims to be paid in September the date should be 31/08/2019. For claims to be paid in October this should be 30/09/2019.</p>
<b>Employee payroll number</b>	Enter the employee payroll number and then press the black validate tick ✓. This will validate the payroll number and populate the name and job title boxes. If you enter an invalid payroll number the row will turn red and you will not be able to submit the claim.

 (validate row)	This will validate the employee number entered.
Employee name	This will be displayed once the validate row button has been clicked.
Job	<p>Once the validate button has been clicked this will display the persons job (position).</p> <p>Where an employee only has one job this will appear in the box with the word (current) in brackets.</p> <p>If the employee has more than one job the job box will default to Contract <b>DO NOT ENTER DATA AGAINST CONTRACT</b>. Use the drop down list to select the job you want to enter data against.</p>
 (validate row)	This will now validate the whole row of data and identify any errors in red
 plus or minus row	<p>Once you are happy with your data row you can start a new one either for the same employee or a different employee by clicking the plus icon.</p> <p>If you want to delete a row of data click the minus button.</p>
	This button can be used to validate the whole sheet in one go.
	Once all records are validated press the save button to submit the data to the live system.

- Once all the entries are completed, click the **Validate** button at the bottom of the screen to ensure no errors are flagged up in red.
- Then click the **Save** button to submit the entries. The screen will become blank again. When you save, the Payroll > Temporary input screen will be updated immediately for each person you did input for.
- **FOR ACADEMIES/FREE SCHOOLS ONLY**, you can run a temporary input report to check your data entry.
- **FOR MAINTAINED SCHOOLS**, contact [payroll.manager@RBWM.gov.uk](mailto:payroll.manager@RBWM.gov.uk) and a report will be run on your behalf and returned so the entries can be double checked.

## 5.1. Ad Hoc Payments

When you select 'Ad Hoc Payments', the form will appear. In addition to the [criteria](#) above, this form will include:

Cash	Input the cash value
Cash- Fees/Lectures	Input the cash value

## 5.2. Additional Hours – Non-Teaching

Use this screen to capture additional hours for “extra” hours worked non-teaching staff outside\on top of contracted hours; these hours can be at the standard hourly rate, at time and a half or at double time for non-teaching staff. This is not used for positions of zero hours like After School Club Assistant or Breakfast Club Assistant as this input does not generate holiday allowance.

When you select 'Additional Hours – Non-Teaching', the form will appear. In addition to the [criteria](#) above, this form will include:

<b>X 1.0</b>	Time at flat rate
<b>X 1.5</b>	Time and a half
<b>X 2.0</b>	Double Time

### 5.3. Additional Hours – Teaching

Use this screen in four different ways, depending on the part or full-time teaching roles:

- PT (part-time) teachers hours: if a teacher works part-time and is working additional hours, use the “PT or Supply Hours” field to capture the number of hours & specify the cost code these hours should be costed against by capturing an 8 character cost code in the “Cost Code” field
- Supply teacher’s hours: if a teacher works part-time and is working additional hours as supply, use the “PT or Supply Hours” field to capture the number of hours & specify the cost code these hours should be costed against by capturing an 8 character cost code in the “Cost Code” field
- FT (full time) teachers’ hours: if a full-time teacher works additional hours doing normal teaching work over and above their full- time hours and pay, capture the additional hours in the “FT Hours” field
- FT (full time) teacher cash sum: if a full-time teacher requires a cash payment for doing additional normal work over and above their full-time hours and pay, capture the additional hours in the “FT Cash” field

Additional Hours - Teaching

Fast input details Additional Hours - Teaching

Payroll

Payment date

Date earned

Date earned	Employee payroll number	Employee name	Job	PT or Supply Hours	Cost Code	FT Hours

VALIDATE SAVE

FT Hours FT Cash

When you select ‘Additional Hours – Teaching’, the form will appear. In addition to the [criteria](#) above, this form will include:

<b>PT or Supply Hours</b>	Input supply hours
<b>Cost Code</b>	Input Cost Centre that you want it to be paid to
<b>FT Hours</b>	Input additional hours for full time teachers
<b>FT Cash</b>	Input the cash value

### 5.4. Relief – Non-Teaching

Use this screen to capture hours worked by staff in zero-hour positions who only have temporary input for those specific jobs e.g. After School Club Assistant or Breakfast Club Assistant; these can be at flat rate, at time and a half or at double time for non-teaching staff. It is important to use this screen as it includes their holiday allowance.

Relief - Non Teaching

Fast input details Relief - Non Teaching MENU

Payroll

Payment date

Date earned

Date earned	Employee payroll number	Employee name	Job	x 1.0	x 1.5	x 2.0
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

VALIDATE
SAVE

x 2.0

✓ + -

When you select 'Relief – Non-Teaching', the form will appear. In addition to the [criteria](#) above, this form will include:

<b>X 1.0</b>	Time at flat rate (plus holiday pay)
<b>X 1.5</b>	Time and a half (plus holiday pay)
<b>X 2.0</b>	Double Time (plus holiday pay)

## 5.5. Training Expenses

Training Expenses

Fast input details Training Expenses MENU

Payroll

Payment date

Date earned

Date earned	Employee payroll number	Employee name	Job	Mileage	Fares
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

VALIDATE
SAVE

When you select 'Training Expenses', the form will appear. In addition to the [criteria](#) above, this form will include:

<b>Mileage</b>	Input the total cash value
<b>Fares</b>	Input the total cash value

## 5.6. Travel Expenses

Travel Expenses

Fast input details Travel Expenses MENU

Payroll

Payment date

Date earned

Date earned  Employee payroll number  Employee name  Job  Expenses - Non taxable  Expenses - Taxable

VALIDATE SAVE

When you select 'Travel Expenses', the form will appear. In addition to the [criteria](#) above, this form will include:

<b>Expenses – Non taxable</b>	Input the total cash value
<b>Expenses – Taxable</b>	Input the total cash value

## 6. Reporting Tools

Reporting Tools gives you access to specific reports you can run for your school.

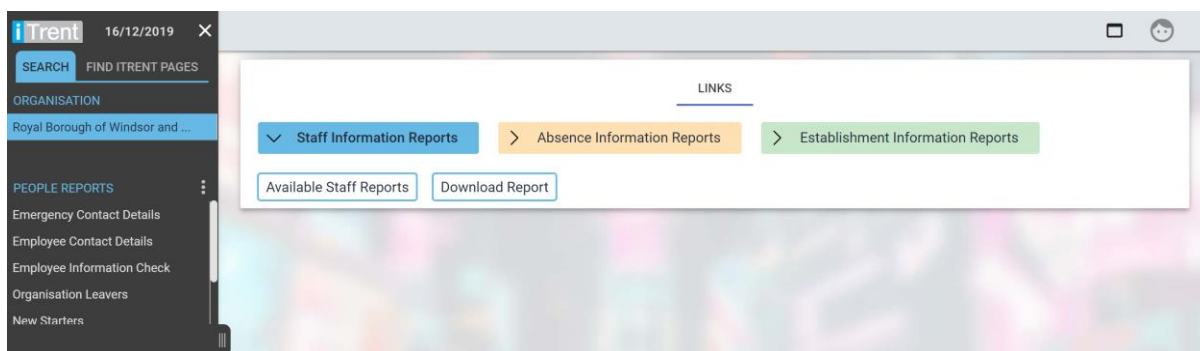
### 6.1. Basic Reporting Tools Information

This section gives an overview of the principles about how reports are run and downloaded.

When you want to run a report, select 'Reporting Tools' on the landing page (below image).



Following this, a page will appear (below image), you will need to select a folder (i.e. Staff Information Reports), then click Available Reports (i.e. Available Staff Reports). It should bring up the side bar on the left-hand side with the different reports you can run.



When you select a report, it will ask you to input an effective.

Each report has different criteria you will need to select or input. Your organisations start point is the school and this will automatically appear. Some criteria are the same across all reports, including:

<b>Organisation View</b>	This should be set to 'Show all data by unit'
<b>Full Path Display</b>	This should be ticked
<b>Show Details</b>	This should be ticked
<b>Include Cover Pages</b>	This should be ticked
<b>Output Type</b>	This should be set at CSV file if you want the report as a spreadsheet. Or this should be set as PDF if you want the report as a PDF.

The report will run in the background.

### 6.2. Downloading a report


When a report is complete, iTrent will notify you in a few ways.

1. An email to your work email (**provided the email on your user is your work email**)



2. A notification on the bottom right hand section of your screen
3. A small notification icon on your screen at the top.

#### 6.2.1. Downloading the report from another page

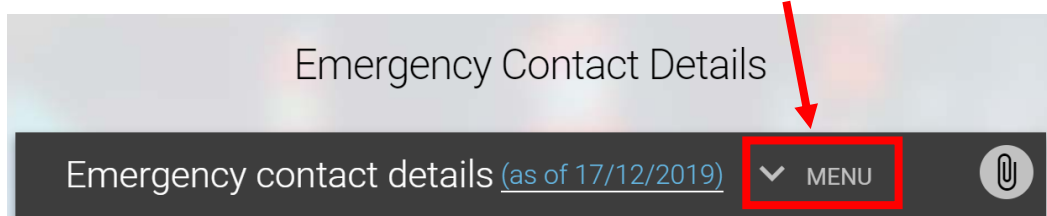
Return to the landing page by selecting the search button  on the left-hand side and select the iTrent logo, which will take you back to the home page.

On the bottom left hand side of the landing page, please select 'My to do list/Processes' and then click the 'Processes' option at the top of the screen. Please go to [6.2.4. Download Output](#)

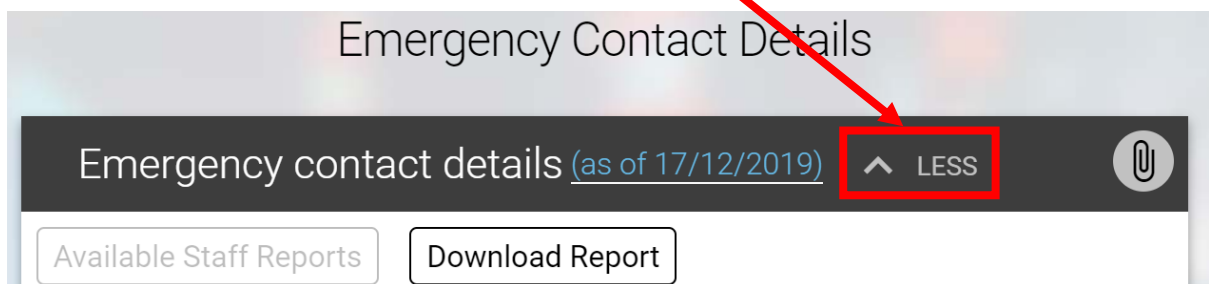


#### 6.2.2. Download Report Link

If you are already on the report link, please select the 'Menu' option.



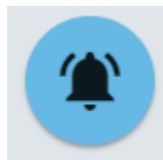
When the menu links appear, click on 'Download Report'.



Please go to the next step ([6.2.4. Download Output](#))

#### 6.2.3. Notification Icon

A notification icon (as shown below) should appear on the top left-hand side of your iTrent screen. When you click on the notification icon, you will be directed to the Download Output page. Please see [6.2.4. Download Output](#)



6.2.4. Download Output

Emergency Contact Details

Download output Emergency Contact Details

▼

MENU


View output from

Today

Available report outputs

Run date & time	Comments	Download	Delete Select all
-----------------	----------	----------	----------------------

You will be able to see your report on the list if it was run today. If your report was completed before today, please click ‘Today’ which will give you other options.

When you select the report, there will be a download icon  , please click this and save it.

- Today
- Today
- Previous 7 days
- Previous 30 days
- Specific date range
- All

6.3. List of Reports

On the list of reports detailed below you will need to hold down the ‘Ctrl’ key and use the mouse to click on the report you want to see in more detail.

<b><u>People</u></b> <a href="#">Emergency Contact Details</a> <a href="#">Employee Contact Details</a> <a href="#">Employee Information Check</a> <a href="#">Organisational Leavers</a> <a href="#">New Starters</a> <a href="#">People Headcount</a> <a href="#">Years of Service</a>	<b><u>Absence</u></b> <a href="#">Absence History</a> <a href="#">Absence Tolerance</a> <a href="#">Bradford Factor</a>  <b><u>Payroll</u></b> <a href="#">Temporary Input</a>	<b><u>Structure</u></b> <a href="#">Employees with Multiple Positions</a> <a href="#">Headcount Analysis</a> <a href="#">Position and Structure Details</a>
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### 6.3.1. Emergency Contact Details

This report is based on employee's emergency contact details.

We recommend not changing the criteria that is displayed as default for this report.

The screenshot shows a web-based configuration interface for an 'Emergency Contact Details' report. The title 'Emergency Contact Details' is at the top. Below it, a dark header bar contains the text 'Emergency contact details (as of 15/12/2019)' followed by a 'MENU' button and icons for refresh and print. The main configuration area is a white box with several settings: 'Filter type' is set to 'Organisation start point'; 'Organisation start point' is set to 'Royal Borough of Windsor and Maidenhead' with a search icon; 'Organisation view' is set to 'Show all data by unit'; 'Full path display' and 'Include cover pages' are both checked; 'Output type' is set to 'CSV File'; and 'Report run comments' is an empty text box. A green 'RUN' button is located at the bottom center of the interface.

The information that is contained on this report includes;

- Structure 1-10
- Reporting Unit
- Employee's Name
- Contact's Name
- Relationship to Employee
- Address Line 1 – 6
- Country
- Contact Phone No
- Primary Contact

### 6.3.2. Employee Contact Details

This report details the employees contact details.

## Employee Contact Details

Employee contact details (as of 18/12/2019) ▼ MENU

Refresh

Print

Download

Select by • Structure ▼

Organisation start point • Royal Borough of Windsor and Maidenhead ▼ 

Q

Structure selection • All units ▼

Address or contact • Address ▼

Address type • Mailing address ▼

Reference number • Personal reference ▼

Remove blank address columns ☒

Exclude employees with no details ☒

Include cover pages ☒

Output type • PDF File ▼

Report run comments

RUN

The information that is contained on this report includes;

- Structure Unit 1-16
- Position
- Title
- Surname
- Forename 1-2
- Personal Reference
- Preferred Name
- Contact
- Address Line 1 - 6

### 6.3.3. Employee Information Check

This report details information about the employee.

The screenshot shows a web interface for generating an 'Employee Information Check' report. The title 'Employee Information Check' is centered at the top. Below it is a dark header bar containing the text 'Employee information check (as of 18/12/2019)' followed by a dropdown arrow and the word 'MENU'. To the right of the header are two circular icons: a refresh icon and a print icon. The main form area is white and contains several input fields and controls: 'Organisation start point' with a search icon, 'Organisation view' with a dropdown menu currently set to 'Show all data by unit', 'Name' with a search icon, 'Form return date' with a date picker icon and the value '18/01/2020', 'Include cover pages' with a checked checkbox, 'Output type' with a dropdown menu set to 'PDF File', and 'Report run comments' with a text area. At the bottom center of the form is a green button labeled 'RUN'.

The information that is contained on this report includes;

- Structure Unit 1-16
- Position
- Title
- Surname
- Forename 1-2
- Personal Reference
- Preferred Name
- Contact
- Address
  - Mailing Address 1-6
  - Business
  - Holiday
  - Home
  - Term-Time
  - Weekend
- Contact
  - Correspondence Email
  - Fax
  - Home Email Address
  - Home mobile
  - Home telephone
  - Internal telephone
  - Pager
  - User email address
  - Work Email address
  - Work Mobile

#### 6.3.4. Organisational Leavers

Organisational Leavers is the specific people who have left in the timeframe you have selected.

The screenshot shows a web-based configuration interface for an 'Organisation Leavers' report. At the top, the title 'Organisation Leavers' is centered. Below it is a dark header bar containing the text 'Organisation leavers (as of 18/12/2019)' followed by a dropdown arrow and the word 'MENU'. To the right of the header are two circular icons: a refresh icon and a print icon. The main configuration area is a white box with a light gray border. It contains several settings: 'Organisation start point' with a search icon; 'Organisation view' set to 'Show all data by unit' with a dropdown arrow; 'Full path display' with a checked checkbox; 'Start date' and 'End date' both set to '18/12/2019' with calendar icons; 'Show details' with a checked checkbox; 'Include cover pages' with a checked checkbox; 'Output type' set to 'PDF File' with a dropdown arrow; and 'Report run comments' with a text input field. At the bottom center of the interface is a large green button labeled 'RUN'.

The information that is contained on this report includes;

- Structure Unit 1-10
- Employee Name
- Personal Reference
- Job Title
- Position Occupancy Reference Number
- Leaving Date
- Last working date
- Reason for Leaving
- Exit Interview
- Length of Service
- New Employer

### 6.3.5. New Starters

New Starters report is the specific people who start in the timeframe you have selected.

The screenshot shows a web interface for configuring a 'New Starters' report. At the top, the title 'New Starters' is centered. Below it is a dark header bar containing the text 'New starters (as of 18/12/2019)' with a dropdown arrow, a 'MENU' button, and icons for refresh and print. The main configuration area is a white box with the following fields: 'Organisation start point' with a search icon, 'Organisation view' set to 'Show all data by unit' with a dropdown arrow, 'Start date' and 'End date' both set to '18/12/2019' with calendar icons, 'Show details' with a checked checkbox, 'Full path display' with a checked checkbox, 'Include cover pages' with a checked checkbox, 'Output type' set to 'PDF File' with a dropdown arrow, and 'Report run comments' with a text input box. At the bottom of the interface is a large green button labeled 'RUN'.

The information that is contained on this report includes;

- Structure Unit 1-10
- Name
- Personal Reference
- Job Title
- Position Occupancy Reference Number
- Organisation Start Date
- Occupancy Start Date
- Reporting Manager
- Reporting Post
- Category
- Basis
- Type
- FTE

### 6.3.6. People Headcount

People Headcount details the people in the selected 'Organisation start point'.

The screenshot shows a web interface titled "People Headcount". At the top, there is a dark header bar with the text "People headcount (as of 18/12/2019)" and a "MENU" button. To the right of the header are two circular icons: a refresh icon and a print icon. Below the header is a white form area with several fields and checkboxes. The fields are: "Organisation start point" with a search icon, "Organisation view" with a dropdown menu showing "Show all data by unit", "Reference number" with a dropdown menu showing "Personal reference", "Full path display" with a checked checkbox, "Include cover pages" with a checked checkbox, "Output type" with a dropdown menu showing "PDF File", and "Report run comments" with a text input box. At the bottom of the form is a green "RUN" button.

The information that is contained on this report includes;

- Structure Unit 1-10
- Reporting Unit
- Forename
- Surname
- Personal Reference
- Start Date
- Position Name
- Length of Service



### 6.3.7. Years of Service

Years of Service details information about the amount of time staff members have been working in the 'Organisation start point' selected.

The screenshot shows a web interface titled 'Years of Service'. At the top, there is a header bar with the text 'Years of service (as of 18/12/2019)' and a 'MENU' button. Below this, there is a filter section with the following options:

- Filter type:** Organisation start point ▼
- Organisation start point:** Royal Borough of Windsor and Maidenhead (with a search icon)
- Organisation view:** Show all data by unit ▼
- Full path display:** ☒
- Include cover pages:** ☒
- Output type:** CSV File ▼
- Report run comments:** (text input field)

At the bottom of the form, there is a green button labeled 'RUN'.

The information that is contained on this report includes;

- Structure Unit 1-10
- Reporting Unit
- Forename
- Surname
- Gender
- Start Date
- Position Name
- Age
- Length of Service

### 6.3.8. Absence History

Absence History is the previous absences in the selected 'Organisation start point.'

Absence History - People

Absence history ▾ MENU

Unit/Employee • Unit ▾

Organisation start point •  🔍

Absence group ▾

Absence type ▾

Absences from • 18/12/2018 📅

Absences to • 18/12/2019 📅

Reference number Personal reference ▾

Include leavers ☐

Full path display ☐

Organisation view • Show all data by unit ▾

New page for each organisation unit ☐

Output type CSV File ▾

Report run comments

**RUN**

The information that is contained on this report includes;

- Structure Unit 1-16
- Reporting Unit
- Employee Name
- Job
- Leaving Date
- Reference
- Absence Group
- Absence Type
- Absence Reason
- Overlap at Start
- Absent From
- Absent To
- Overlap at End
- Days Lost
- Calc to end of Period
- Auth Key



### 6.3.9. Absence Tolerance

This report allows you to extract a employee's absence based on a specific criteria such as percentage working days, number of absences and number of days absent.

## Absence Tolerances

Absence tolerances

▼ MENU



Unit/Employee

Unit

▼

Organisation start point

🔍

Absence group

▼

Absence type

▼

Absences from

18/12/2018

📅

Absences to

18/12/2019

📅

Reference number

Personal reference

▼

Include leavers

☐

### Absence tolerance limits

Combine with

And

▼

Percentage of working days

0.00

Number of absences

0

Number of days absent

0.00

Full path display

☐

Organisation view

Show all data by unit

▼

New page for each organisation unit

☐

Output type

CSV File

▼

Report run comments

RUN

The information that is contained on this report includes;

- Structure 1-10
- Surname
- Forename
- Position
- Leaving Date
- Reference No

- Absence Position
- Absence Type
- Absence Group
- Absence Reason
- Overlap at Start
- Absent From
- Absent To
- Overlap at End
- Days Available
- Open %
- Days Lost
- Authorisation Status

### 6.3.10. Bradford Factor

This report details information about staff members Bradford factor

Bradford Factor

Bradford factor ▼ MENU

Unit/Employee •  Unit ▼

Organisation start point •  🔍

Absences from • 18/12/2018 📅

Absences to • 18/12/2019 📅

Include Bradford factors above 0000

Reference number  Personal reference ▼

Include leavers  ☐

Full path display  ☐

Organisation view •  Show all data by unit ▼

New page for each organisation unit  ☐

Output type  PDF File ▼

Report run comments

RUN

The information that is contained on this report includes;

- Structure Unit 1-10
- Employee Name
- Leaving Date

Page 36 of 42

- Job Title
- Reference
- No of Absence
- Days Lost
- Bradford Factor

#### 6.3.11. Temporary Input

This report details information about

The screenshot shows a web interface for generating a report. At the top, it says 'RBWM Monthly'. Below that is a dark header bar with 'Temporary inputs' and a 'MENU' dropdown. To the right of the header are refresh and print icons. The main form area contains several settings: a 'User' field with a search icon and a close icon; a 'Sort by' dropdown set to 'Element type'; a 'Use smart group' checkbox which is unchecked; an 'Include header & footer pages' checkbox which is checked; an 'Output type' dropdown set to 'CSV File'; and a 'Report run comments' text area. At the bottom center is a prominent green 'RUN' button.

The information that is contained on this report includes;

- Element Type
- Element
- Payroll Reference
- Position
- Surname
- Forename
- Earned Date
- Last Modified User
- Last Modified Date
- Last Modified Time
- Input Time
- Input Unit
- Input Rate
- Input Value
- Calculated Value

### 6.3.12. Employees with Multiple Positions

This report details information about staff members who have multiple positions.

Employees With Multiple Positions

Employees with multiple positions (as of 18/12/2019) ▼ MENU

Unit/Employee • Unit ▼

Organisation start point/Employee • 🔍

Effective date • 18/12/2019 📅

Output type • PDF File ▼

Report run comments

**RUN**

The information that is contained on this report includes;

- Unit Level 1-10
- Position Name
- Name
- Social Security No
- Personal Ref No
- Occupancy Start Date
- Category
- Basis
- Type

### 6.3.13. Headcount Analysis

This report is an analysis of staff members in the selected 'Organisation start point'.

The screenshot shows a web interface titled "Headcount Analysis". Below the title is a dark header bar containing the text "Headcount analysis (as of 18/12/2019)" followed by a dropdown arrow and the word "MENU". On the right side of the header bar are two circular icons: a refresh icon and a print icon. The main content area is a light gray box with the following fields and controls:

- "Organisation start point" with a text input field and a search icon (magnifying glass) to its right.
- "Type" with a dropdown menu.
- "Organisation view" with a dropdown menu currently showing "Show all data by unit".
- "Show details" with a checked checkbox.
- "Full path display" with an unchecked checkbox.
- "Exclude if under 1 yrs service" with an unchecked checkbox.
- "Output type" with a dropdown menu currently showing "PDF File".
- "Report run comments" with a text input field.

Below the configuration box is a large green button with the word "RUN" in white capital letters.

The information that is contained on this report includes;

- Structure Level 1 – 10
- Name (\* - indicates a contract employee)
- Male
- Female
- Unspecified
- Job Title
- Full Time
- Part Time
- Job Share
- Grade
- Type
- Category
- Contracted Hours
- FTE

### 6.3.14. Position and Structure Details

This report details information about the selected 'Organisation start point' employees' positions.

## Position And Structure Details

Position And Structure Details [\(as of 18/12/2019\)](#)
MENU

Organisation start point •

Organisation view •

Show all data by unit ▼

Split by cost code ☐

Full path display ☐

Report details

Include header & footer pages ☒

Output type ▼

Report run comments

↵

RUN

The information that is contained on this report includes;

- Structure Unit 1-10
- Reporting Unit
- Position Name
- Position Reference
- Position Status
- Surname
- Forename
- Occupancy Reference
- Reference Number
- Payroll Reference Number
- Calculated FTE
- Actual Scale point Val
- Pro-Rated Actual Scale point Val
- Protected Scale point Val
- Pro-Rated Protected Scale point Val
- Actual Scale point Ref Code
- Protected Scale point Ref Code
- Grade Name
- Scale Ref Code
- Annual Scale Frequency
- Annual Protected Frequency
- Contractual Hours
- FT Hours
- Weeks Worked
- Ft Weeks



## 7. HR Hub

The HR Hub is an online platform that will be used to hold current and frequently used HR policies. It will not replace SharePoint but is a quick access to information. This will be reviewed and updated regularly.

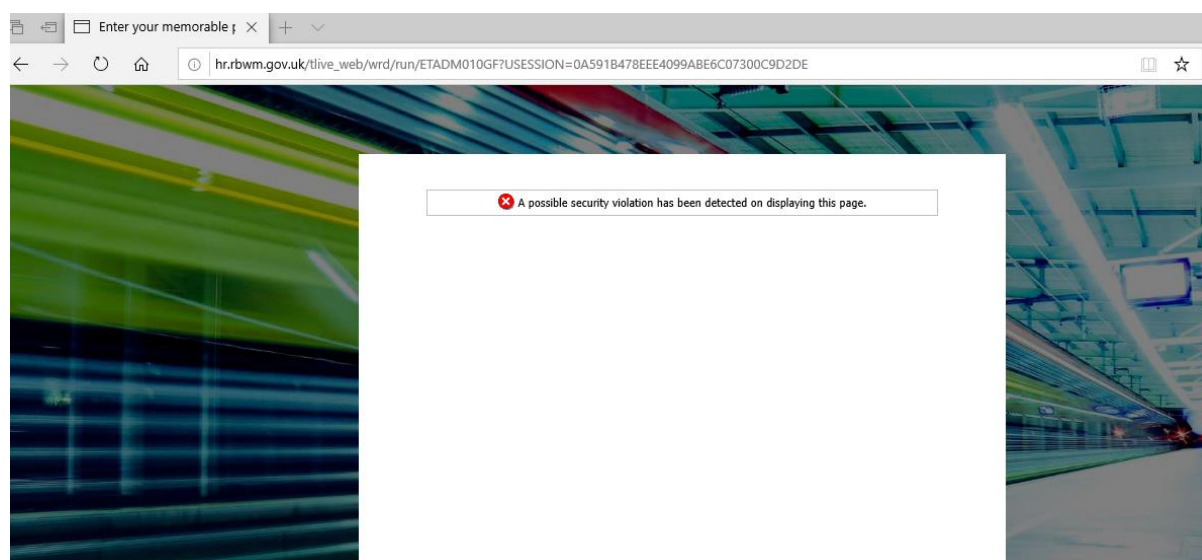
It will also hold user guides and videos on how to complete a particular iTrent task.

## 8. Simple Troubleshooting

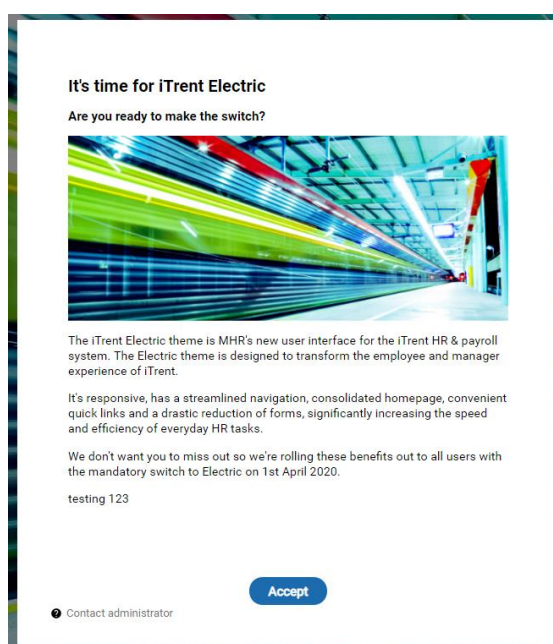
There are simple issues that can be fixed that are easy to do.

### 8.1. Error/Security Risk

If you are receiving this following issue:



IT have advised us you are able to proceed and continue using this site. Please scroll down and select 'Accept'. The message that is supposed to appear is below:



### 8.2. Forgotten Password

If you forgot your password, please complete the following steps.

### 8.3. Forgotten Memorable Password

Individuals are unable to reset their memorable password, please find the contact information below for Trent Support

### 8.4. Forgotten Login Details/Username

If you have forgotten your login details or username, please have your National Insurance Number and Date of Birth at hand as we request this information for identification purposes. Please find the contact information below for Trent Support.

## 9. Contact Trent Support.

In case of any queries, please contact us using the following details:

Email – [Trent.Support@rbwm.gov.uk](mailto:Trent.Support@rbwm.gov.uk)

Phone – 01628 796263

**Please be advised**, we aim to respond to your email/ticket within 3 working days.

Our Service Times are Monday to Thursday 08:45 – 17:15 and Friday is 08:45 – 16:45.