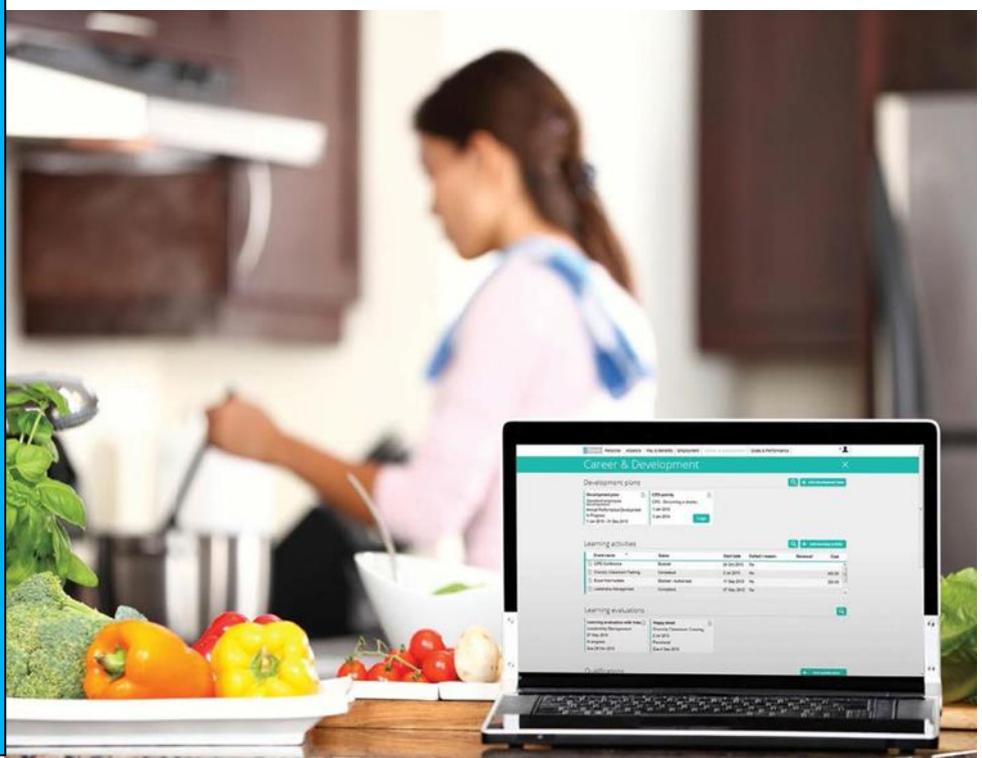
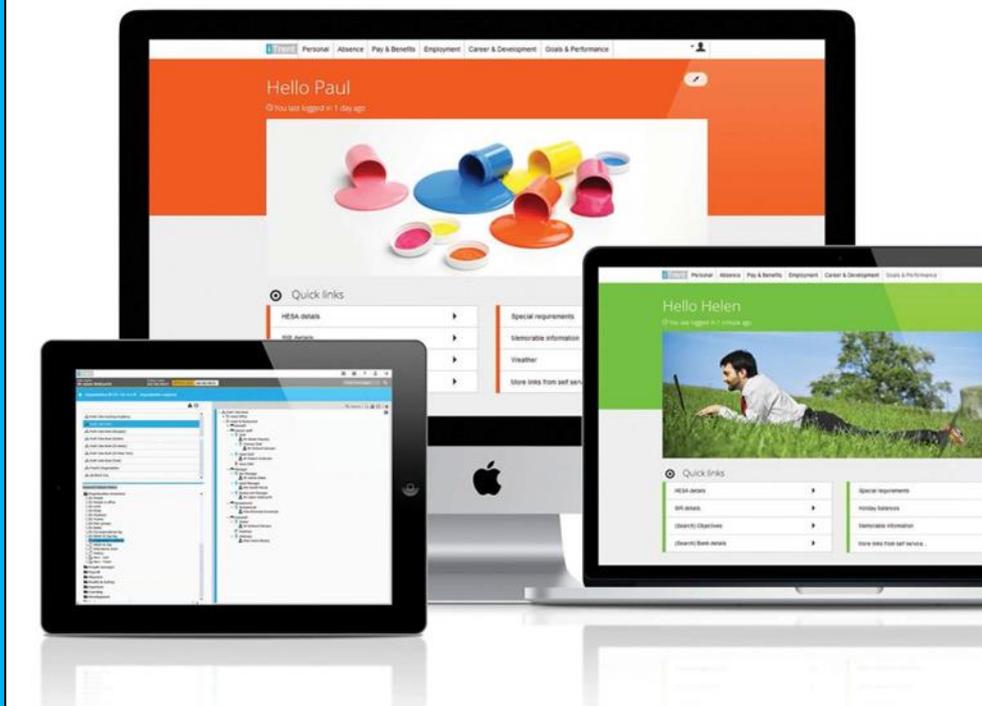
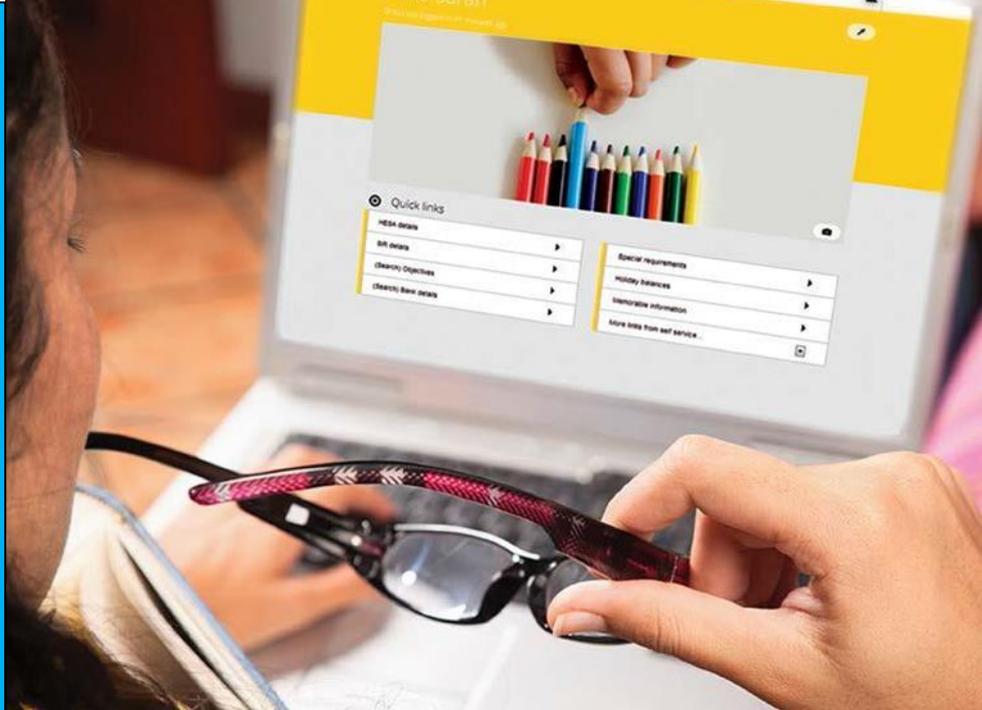


# CCBC iTrent Employee Self Service (ESS)

## Flexitime and Annual Leave FAQs.

To request further  
information and support,  
contact  
[flexiandannualleavequerie  
s@caerphilly.gov.uk](mailto:flexiandannualleavequerie<br/>s@caerphilly.gov.uk)



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## General Questions

### **Where do I access my Flexitime and Annual Leave details from 26<sup>th</sup> September?**

From the 26<sup>th</sup> of September you will need to manage your flexitime and annual leave through iTrent Self Service.

### **Why are we moving from Crown (Open Options)?**

iTrent is our HR, Payroll and Management Information system that holds your employment data. Introducing the Time and Attendance and Annual Leave modules to iTrent allows us to keep all of your data in one place, providing efficiencies in the administration of personal records and a better user experience for employees and people managers.

### **How do I log on to iTrent Self Service?**

You can use the iTrent Self Service or Flexitime links on the intranet, which take you to the iTrent Self Service Single Sign -On screen.

### **Do I have to log-in via Single Sign-On?**

Yes, iTrent is configured for Single Sign-On to save employees time and prevent the re-entering of usernames and passwords. Simply click 'Single Sign-On' and then 'Organisational Login' on the next screen.

### **Can I use my personal phone to manage my flexitime and annual leave?**

Yes, follow the instructions in the User Guide to get set up. You'll note a QR code is provided to assist you with this. Scan the code and this will open the URL (webpage). We recommend adding the page to your home screen to enable quick access. Note the system will not be live to clock in until the 26<sup>th</sup> September.

### **Can I access iTrent ESS on any smart device?**

It should work on most smart devices, but we understand that iTrent ESS does not work on Android devices which operate on less than Android 10 processors. IT Helpdesk will be able to advise if you have any queries.

## Flexi Specific Questions

### **Will my balance transfer into iTrent from Crown (Open Options)?**

Yes, on the 22<sup>nd</sup> of September we will take a final cut of data from Crown (Open Options) and upload this into iTrent. So, you need to ensure that your flexi records are up to date in advance of this and all exceptions (flags) are rectified. You will need to enter a retrospective clock in for Monday 25<sup>th</sup> September when the system is live, details on how to do this are included in the user guide.

### **Will I be able to refer back to my Crown (Open Options) record after September if I need to check any details?**

No, unfortunately the service that Crown (Open Options) operates on is being decommissioned so this will not be possible.

### **What if I missed something before Crown (Open Options) is decommissioned and need to adjust my balance in iTrent?**

You will need to have a conversation with your manager and agree on the required adjustment (in minutes) i.e. 7.4 hours = 444 minutes. Once agreed, an adjustment can be made to your iTrent record accordingly.

### **Will my future dated scheduled Flexi Leave transfer to iTrent?**

No, unfortunately future dated Flexi leave requests cannot transfer into iTrent, you will therefore need to request these again in iTrent.

### **Can I still use the Flexi clock machines to swipe my employee card and record my time?**

No. The machines are no longer in use as they were linked to the old Crown (Open Options) system. Flexitime on iTrent ESS allows you to use any device, anywhere to record your time.

### **Why do I need to be clocked out to add missed clock-in details for the previous day?**

This is how the system is built. Flexitime administration is built around the Flexitime Details page. Your time is recorded from this page, and once you have clocked-in the system recognises this as an open record, therefore the only option available will be to clock-out. To make a retrospective entry you will need to do this before you clock-in, or after you've clocked-out.

### **Why does my flexi balance reduce in middle of the day?**

The system is dynamic and makes real time adjustments. Once you have completed a period/shift i.e., a morning, iTrent looks at your working pattern for the day and adjusts your balance as it cannot presume that you intend to return to work in the afternoon.

Once you have worked the second period/shift it recalculates again using your pattern and adjusts your balance accordingly.

### **Why does my flexi balance adjust overnight?**

In line with our Flexible Working Hours Procedure, where an employee works over 6 hours, they are required to take a 30-minute continuous break period. Where this has not happened, the system will make the necessary adjustment to your balance. iTrent will look at all breaks taken, find the longest, and if this is short of 30 minutes it will adjust your balance by the outstanding number of minutes. If you don't record any breaks and just work one period of over 6 hours, the system will adjust your balance by 30 minutes.

Your balance is up to date first thing in the morning before you clock in.

### **Where can I see my clock-in history?**

Simply click on 'View all flexitime' on your Flexitime card in iTrent ESS. Here you will see a list of all you recorded periods of work. Note, unlike Crown (Open Options) you cannot see the records as a daily summary, instead all periods of work are listed separately and chronologically. For example, if I worked 3.5 hours in the morning and 4 hours in the afternoon on the 26<sup>th</sup> of September, this would display as two records for the 26<sup>th</sup> of September, not as one 7.5-hour period. You can find full details in the user guide on how to view your flexi records.

### **Will my manager see my flexi adjustments?**

You can adjust your Flexitime records where required/necessary. Full details again are provided in the User Guide. When adjustments are made, your manager will be notified of the change by email so it is important to include an explanation for the adjustment in the notes field as this will be auditable and monitored by your manager.

### **What happens to my flexitime balance when I book Flexi Leave?**

As soon as you make the request in iTrent, the system will adjust your balance even before the leave request is authorised. This is different to Crown (Open Options). In

Open Options, your balance remained unaffected until the leave was taken. This means that you will need to have sufficient credit on your balance before requesting Flexi leave.

In Open Options it had been noted that employees where scheduling Flexi Leave way in advance of having the credit on their balance, which is not a practice we would support, and this will no longer be an option in iTrent.

### **What happens to my balance if I don't enter any flexitime details for a day?**

You'll note iTrent works differently to Open Options in these circumstances. If you are unable to record details for a day, your balance will remain unchanged and will simply carry over from the previous day without adjustment. In the background however, the system will look to see if there's an explanation for the absence i.e., flexi leave request, annual leave request, recorded sickness absence or leave of absence. If the system cannot find a reason for you not having recorded your time, your manager will receive an email notifying them that you have failed to clock-in and you will also receive an email notifying you of the issue and prompting you to enter your details accordingly.

NB: employees must provide clock-in and clock-out details for every workday unless there is a justified and recorded reason for the absence.

## **Holidays (Annual Leave) Specific Questions**

### **Will my annual leave entitlement/balance in iTrent account for the leave I've already taken?**

Yes, where annual leave has been booked through Crown (Open Options). The dates requested will be transferred into iTrent and the system will use these to adjust your available balance. You'll be able to see the dates in the absence details screen – more information is available in the User Guide.

### **Will any future dated authorised Annual Leave in Crown (Open Options) transfer to iTrent?**

Yes, annual leave works slightly differently to Flexi Leave as your entitlement is based on your contract and is therefore fixed. For this reason, future dated scheduled annual leave can transfer and will be accounted for in your available balance. Again, you can view the dates in the absence details screen.

### **Why is it referred to as 'holidays' not annual leave on the dashboard?**

iTrent uses the term 'holidays' as the entitlement incorporates both annual leave and bank holiday entitlements as a single balance.

### **So, do I need to book bank holidays if it's a single entitlement?**

No, the system does this for you. It schedules the bank holidays on the appropriate dates and looks at the working pattern for each scheduled day, reducing your entitlement accordingly. So, the balance you see on the dial is 'bookable annual leave' accounting for any offset that some part-time staff often have to calculate manually.

### **How is my Holiday entitlement calculated?**

Your entitlement is calculated as follows:

#### Annual Leave Entitlement Calculation

$(\text{Contractual hours} / \text{FTE Hours}) \times (\text{Proportion of Year Worked} / 365 \text{ days}) \times (\text{FTE Annual Leave Entitlement in Hours})$

#### Bank Holiday Entitlement Calculation

$(\text{Contractual hours} / \text{FTE Hours}) \times (7.4) \times (\text{No. of Bank Holidays in Reference Period})$

#### Holiday Entitlement

Annual Leave + Bank Holiday

### **Why is my entitlement in hours?**

Providing leave in hours enables iTrent to automate the calculation of holiday entitlements for every type of contract and contract change, providing administration efficiencies through the adoption of a single process.

### **Can I have my leave entitlement in days?**

No, for the reasons outlined in the previous question.

### **If leave is in hours, can I book any number of hours for a day?**

No, we will still require you to select a half day or full day when making a request. The system will then look at the working pattern for the requested day and reduce your entitlement accordingly i.e., for a standard 7.40 day, 3.70 (half) or 7.40 (full).

NB: remember the hours are shown as decimals for annual leave.

### **Why does my balance reduce immediately when I request leave?**

The system is dynamic. Once you have requested leave the system adjusts your entitlement accordingly even before the request is authorised. This allows you to

manage your leave effectively. If not authorised, it will show in the absence details screen as Awaiting Authorisation.

**Can I adjust a leave request?**

Yes, you can open future dated request details and adjust accordingly. Note, where adjustments are made, your manager will be required to authorise the request again.