



St Mary's
University
Twickenham
London

PEOPLE MANAGER ELECTRIC USER GUIDE

CONTENTS	PAGE
INTRODUCTION	3
DATA PROTECTION	3
1. HOW TO ACCESS PEOPLE MANAGER	4
I. HOW TO RESET YOUR PASSWORD	
2. NAVIGATION OF PEOPLE MANAGER	7
I. THE MENU BAR	
II. THE ELECTRIC CAROUSEL	
III. THE SECTIONS MENU	
3. ORGANISATION AND TEAM STRUCTURE	13
4. PEOPLE SEARCH	14
5. VIEWING EMPLOYEE INFORMATION	16
6. ABSENCE CALENDAR	19
I. VIEWING INDIVIDUAL ABSENCE CALENDARS	
II. FULL TEAM ABSENCE VIEW	
7. AUTHORISING ANNUAL LEAVE	21
I. AUTHORISING FROM YOUR TO-DO LIST	
II. AUTHORISING FROM THE ABSENCE CALENDAR	
III. UPDATING A HOLIDAY REQUESTS	
IV. ADD NOTES TO A HOLIDAY REQUESTS	
V. DELETE A HOLIDAY REQUEST	
8. SICKNESS ABSENCE	26
I. ADDING A SICKNESS ABSENCE	
II. AUTHORISING A SICKNESS ABSENCE	
III. AMENDNG A SICKNESS ABSENCE	
IV. DELETING A SICKNESS ABSENCE	
9. MANAGEMENT INFORMATION	31
I. SICKNESS ANALYTICAL DASHBOARD	
II. RUNNING BASIC REPORTS	
10. REDIRECTING TASKS	35

INTRODUCTION

The new People Manager – Manager Self Service has been designed to ensure that all levels of manager have access to a wide range of information about their staff within an easy-to-use environment. The following functionality will be available for Line Managers:

- Approve annual leave requests
- View team annual leave calendar
- View sickness absence history
- View team sickness absence calendar
- View job and salary history for team members
- Run management information reports
- Submit electronic timesheets (refer to Timesheets user guide)

If you have line management responsibilities as part of your role you will be allocated a People Manager account. The people visible to you in People Manager are identified by using position to position reporting lines. In systems terms, a line manager for a position would be the authoriser of any leave and will have a view of information for all their direct reportees.

You can also request to setup your view to enable you to see **all** your reports – even if they are not direct reports. For example, a Dean of Faculty or Head of Service will have access to information for everyone in their Faculty, not just their immediate reports.

As a line manager, you will have been given the relevant access through the People Manager function in order to carry out the full range of your line management responsibilities. This is mainly position based or contact information. You do not have access to sensitive information.

DATA PROTECTION

As People Manager contains detailed position information including salary scales it is important that you use it responsibly to ensure that the security of this information is maintained at all time.

Therefore, when you have finished using People Manager please always ensure that you logout.

It is also important that you **never let anyone else know your username and password** as this information would allow people to access information on you and your staff through People Manager, exposing a risk of identity fraud.

1. HOW TO ACCESS PEOPLE MANAGER

You can access People Manager from any internet connected computer device. You can access via your St Mary's computer or device, your own home computer, laptop, tablet, iPad, iPhone or Smartphone.

To access on iPad and iPhone

- Add the following URL address in your address bar:
https://ce0230li.webitrent.com/ce0230li_ess/ess/index.html#/login
- On your device select the 'Send To' icon



- At this stage you have 3 options:
 - 'Add to Favourites' and click save
 - 'Add Bookmark' and click Save
 - 'Add to Home Screen' and click Add

Now the icon will appear on your home screen like an app would.

1.1. TO ACCESS FROM A ST MARY'S SITE

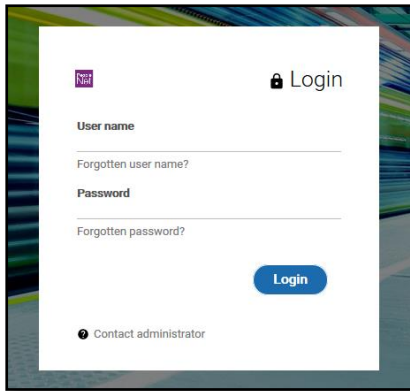
- Go to the StaffNet page
- Click on the PeopleNet icon and logon with your People Manager username (your payroll number found on the back of your staff ID) and password
- Select People Manager link from the quick links menu on PeopleNet

1.2. TO ACCESS REMOTELY FROM A PERSONAL DEVICE

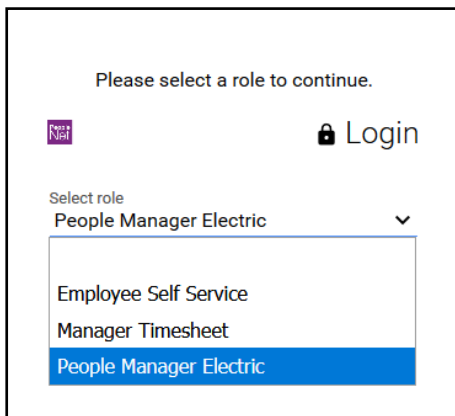
- Go to URL – https://ce0230li.webitrent.com/ce0230li_web

Once you have accessed People Manager, you will see the login screen below appear.

- Login with your **PeopleNet** user name (your payroll number with a leading zero i.e. 0526890) and password, then press Login.



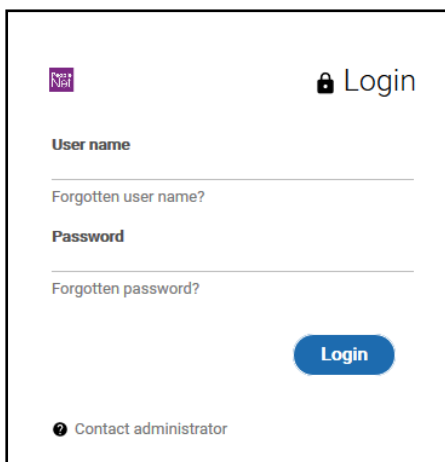
The login screen will refresh to allow you to select which role you want to access. To access your People Manager view you will need to select **People Manager Electric** as shown below:



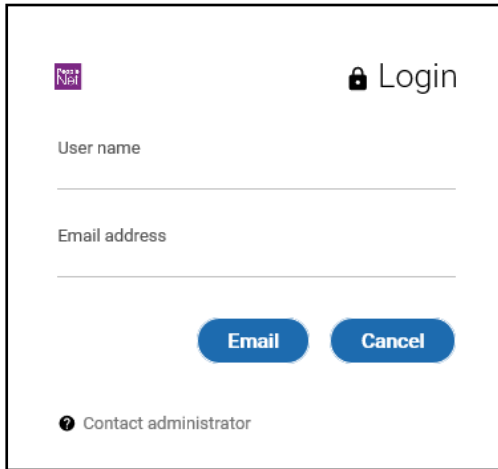
If you are a first-time user you will need to reset your password to setup your account.

1.3. NEW USERS OR FORGOTTEN PASSWORD

1.3.1. If you are a first-time user or you have forgotten your password, click on the forgotten password link:



1.3.2. Another login screen will open up asking for your username and email address (you must enter your **stmarys.ac.uk** email address to reset your password).



PeopleNet Login

User name

Email address

Email Cancel

Contact administrator

1.3.3. Insert your username and email address and click on the 'Email' button, a new window will appear confirming the password reset link has been sent.

An email containing a link to reset your password has been sent to the address provided, and should be received within the next 15 minutes.

1.3.4. A notification will be sent directly to your inbox as shown below:

This e-mail has been sent to you to change your PeopleNet password

Please click on the link below to enter a new password

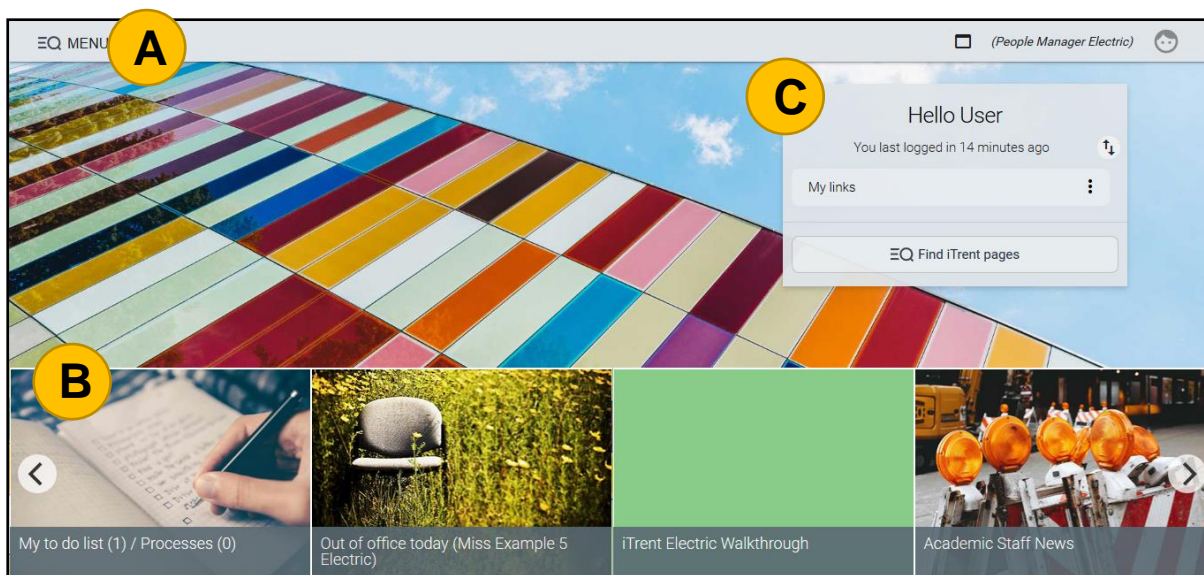
[Reset your password](#)

If you have not forgotten your password / do not need to change your PeopleNet password please contact hssystem@stmarys.ac.uk

2. NAVIGATION ON PEOPLE MANAGER

Once you have logged into People Manager, you will be taken to the Home Page.

The Home Page consolidates information in one place allowing you to see the number of tasks waiting in your 'To do list', important University news and the number of your employees out of the office.



The Home Page is split into three main areas:

- A. The Menu Bar
- B. The Carousel
- C. The Sections Menu

2.1. THE MENU BAR

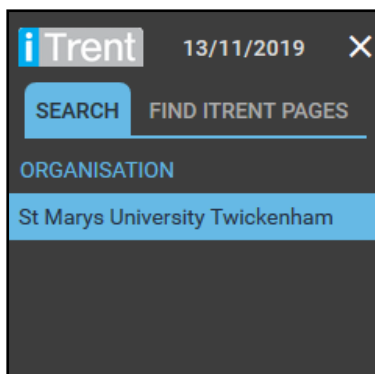
The Menu bar is available at the top of the Home Page and allows you to access the Left-hand pane (LHP), you can open a New View window and also access your User Preferences/other roles.



2.1.1. Menu



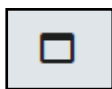
Clicking on 'Menu' opens the Left-hand pane (LHP). From here, you can perform searches.



Clicking on the cross or the iTrent logo at any time will return you to the Home Page.

2.1.2. New View

This is a new feature which allows you to open a New View within another browser window.

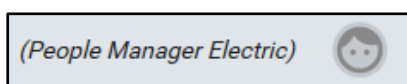


Clicking on the New View button will make it possible for you to view several items of data from the different areas of People Manager at the same time, without replacing the original view. Multiple views may be open at once and each can be navigated independently.

Opening the New View in another browser window also allows you to **work across multiple roles**, this means you can access your personal Employee Self Service (ESS) at the same time as your People Manager Self Service. See below guidance on how to do this.

Clicking on a cross will close the individual session, logging out will log you out of all sessions.

2.1.3. User Preferences

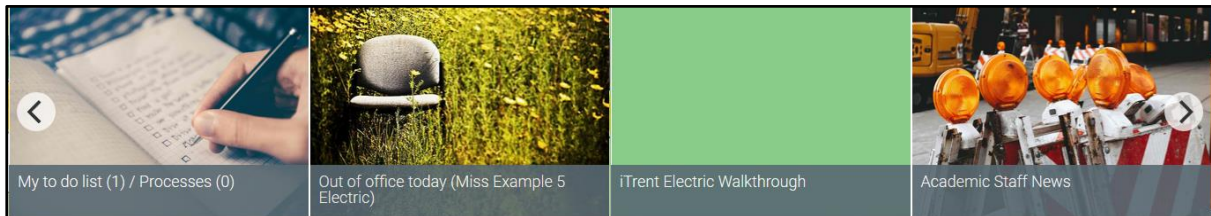


Clicking on the person icon (Mr Pringle face) opens a menu. Options available in the menu will include:

- **Roles**
 - If you have multiple roles assigned you will be able to switch between the roles you are working within (personal Employee Self Service and People Manager, Manager Timesheets).
- **My Preferences**
 - This will direct you to the default user preferences page.
- **Change my password**
 - This allows you to change your password

- **Manager dashboard preferences**
 - This option allows you to amend your manager dashboard settings.
- **Self service**
 - This option allows you to access your own Employee Self Service (ESS) without having to navigate away from People Manager and log in separately.
- **About iTrent**
 - This will display system information
- **Log Off**
 - Clicking on this option will log you out of People Manager.

2.2. THE ELECTRIC CAROUSEL



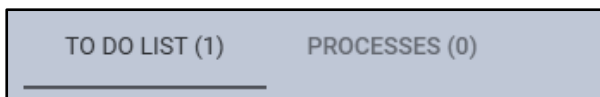
The electric carousel provides access to Company news, My to do list and Processes. You can scroll through the items on the carousel by using the left and right arrows.



Click on an item to view more options/details.

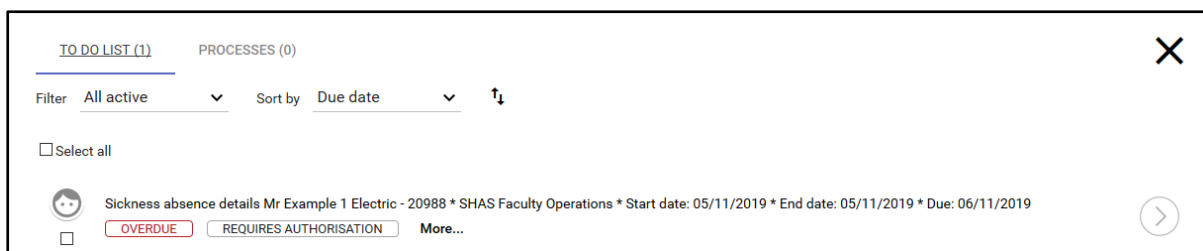
2.2.1. My to do list/ Processes

The My to do list/ Processes icon will display the number of tasks and processes available.

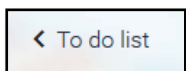


2.2.2. To do list

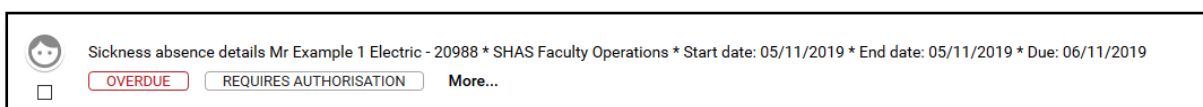
Click on the To do list icon on the Carousel to open your To do list. This will displays all your outstanding tasks generated by workflows.



Clicking on the task or the arrow icon, will take you to the relevant page required to action the task. A link will appear at the top of the page to return to the To do list.

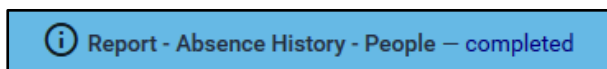


Overdue tasks will be highlighted with an 'Overdue' status.



2.2.3. Notifications

Notifications of new tasks and completion of background processes will not pop up at the bottom of the screen as with the previous People Manager; they will appear instead at the top of the main screen in a noticeable blue bar.



The message will disappear after a few seconds leaving a bell symbol to notify the user of new tasks.

Clicking on the notification bar or bell symbol will take you to the Process on the Home page.

2.2.4. Processes

If you have run a report, iTrent will perform a background process, you are able to view the status of this process via the Processes section.

Processes will show in three stages; **Queued**, **Running**, **Complete**.



Clicking on the process will take you to the relevant page required to view the process.

2.2.5. Out of Office

The **Out of Office** icon lists the members of your team who are out of the office due to annual leave, sick leave or any other type of leave.

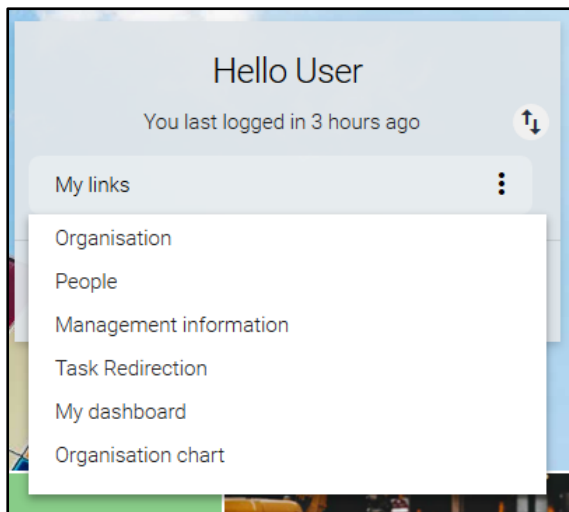
Out of office today (Miss Example 5 Electric)

2.2.6. Company News

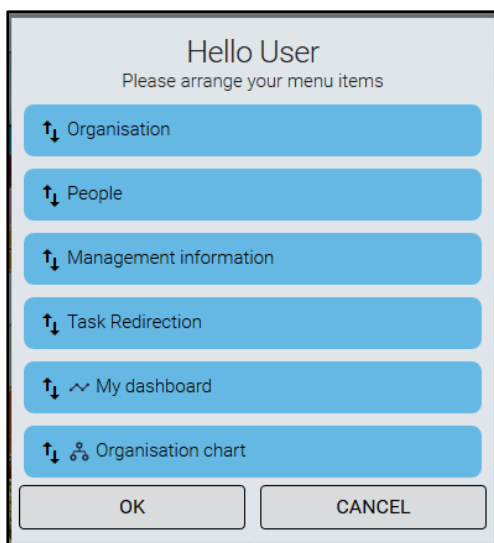
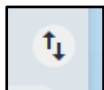
This is a new feature in People Manager where University news is broadcasted in a carousel view. News articles may include text, links, images, and videos.

2.3. THE SECTIONS MENU

The Sections Menu, available on the Home Page, allows access to further folders, and links to specific pages.



2.3.1. You may reorder Sections by clicking on the order icon and dragging the sections into a more preferable order.



2.3.2. Each Section is linked to a related search area of People Manager, therefore clicking on the section will open the relevant data search in the left-hand panel.

2.4. Effective Date

2.4.1. Whilst navigating the system the Effective date box will appear at various stages. This is useful if you want to look at data from a future date or wish to enter a future dated change. Otherwise you should populate with the correct date.



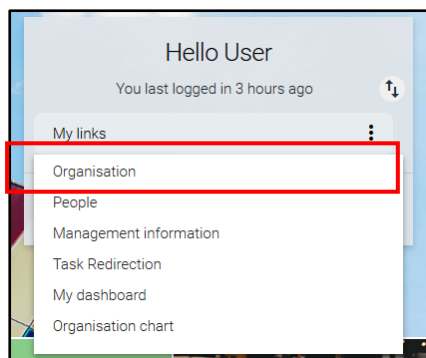
3. ORGANISATION AND TEAM STRUCTURE

The Organisation section on People Manager displays links to view your Organisation Chart, directly download any completed reports, and links to your preferences.

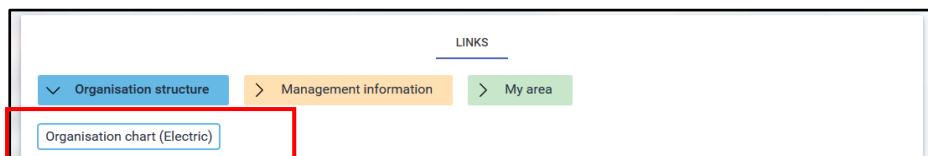
3.1. ORGANISATION CHART

The Organisation Structure is set up to list your direct reporting lines.

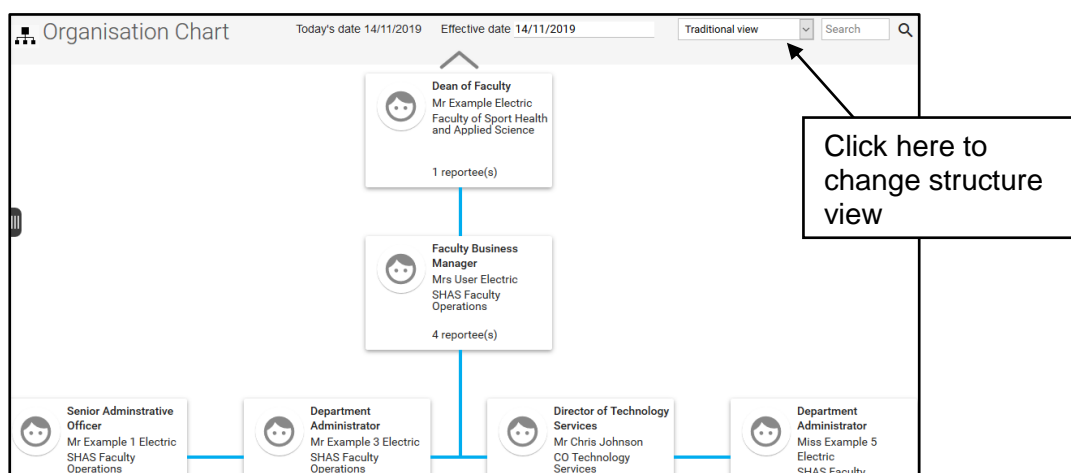
3.1.1 To view your Organisation Structure, click on the Organisation Section from the Sections Menu on your Home Page.



3.1.2. The following screen will display



3.1.3. To view your Organisation chart, select the 'Organisation Structure' folder and then click on the 'Organisation Chart (Electric)' link.



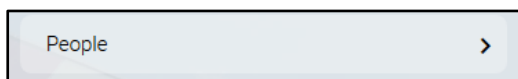
3.1.4. You can control how you wish to view your reporting lines and organisation structure by selecting a different view from the drop-down menu on the top right-hand corner.

4. PEOPLE SEARCH

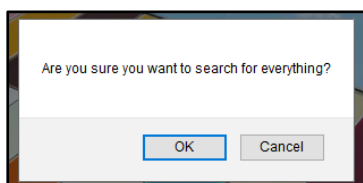
You can search for your reportees in much the same way as in the older theme. The **People** section on People Manager is set up to list your direct reports. The system defaults to organisation structure level.

4.1. VIEW YOUR TEAM

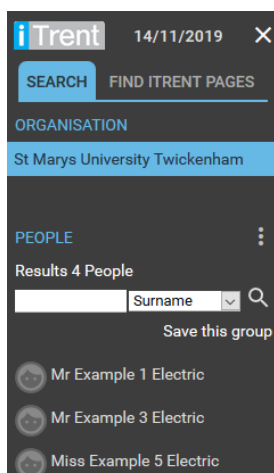
4.1.1. To view your team, you will need to select **People** from the Sections Menu on your Home Page:



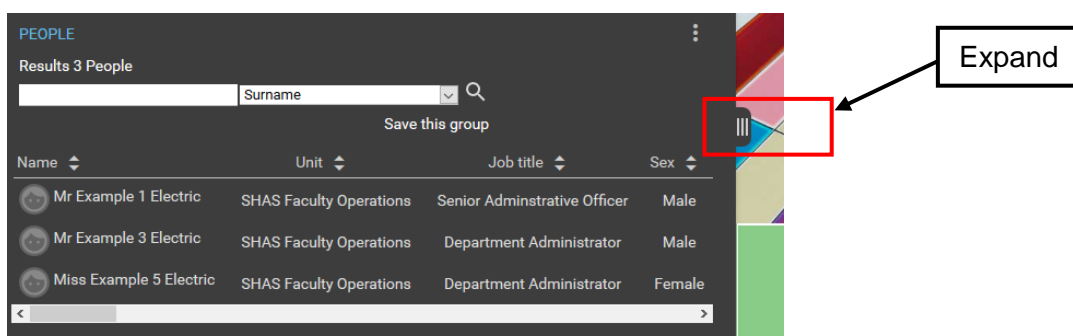
4.1.2. The **People Search** menu will display on the left-hand pane and your direct reports will be listed here. If this list is blank, please click on the search field and do a blank search, the following message will appear.



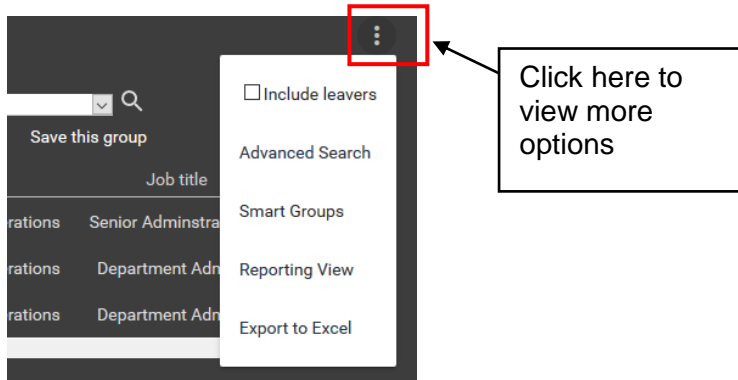
4.1.3. Click 'OK'. Your reportees list should now be displayed like the example below.



4.1.4. Further details of your reportees can be viewed in the search menu by expanding the left-hand pane and scrolling across the columns.



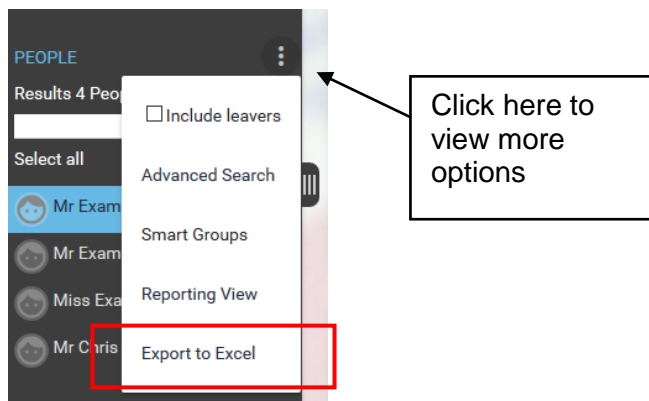
4.1.5. The new search menu allows you to include leavers in your search, run advanced searches, access or setup Smart Groups and has a new export to Excel option as shown below:



4.2. Export to Excel

The export to Excel option is available with all search areas and allows you to quickly extract data from People Manager without the need to produce a report.

To export the search results to an Excel File, click on the search menu and select 'Export to Excel'. The search results will open in an Excel file.



5. VIEWING EMPLOYEE INFORMATION

To view any People Manager information, you must first select the employee you want to view information on from the People Search menu. Once an employee has been selected, the Person Summary screen will display on the main panel.

5.1. PERSON SUMMARY SCREEN

The **Person Summary Screen** provides a snapshot of information for the employee selected and access to further folders and links. You will be presented with the Person Summary Screen as soon as an employee has been selected from the **People Search**.

The screenshot shows the People Manager interface for 'Mr Example 1 Electric'. The left sidebar includes a search bar and a list of people. The main content area is divided into several sections:

- Personal Card:**
 - Known as **Example 1**
 - 1 Year(s) 3 Month(s)** in service
 - 20988 (Personal ref.)
 - 1001116 (Payroll ref.)
 - XX000001D (Social security)
 - example1@gmail.com (Personal)
 - example1.electric@stmarys.ac.uk (Work)
- Employment Card:**
 - Senior Administrative Officer** (1111111112576) SHAS Faculty Operations
 - 36.00 hours Employee Full time Permanent
 - Started on 01/08/2018
 - Reporting manager: **Mrs User Electric**, Faculty Business Manager
- Calendar:**
 - VIEW FULL CALENDAR
 - 14 - 27 November 2019
 - Calendar grid showing dates 14 to 27.
- Holiday and Sick Leave Statistics:**
 - 1 Aug 2019 - 31 Jul 2020:** 97.1 of 144 hours (Holidays remaining)
 - 14 Nov 2018 - 14 Nov 2019:** 122.5 hours (Hours off sick)

5.2. Personal and Employment cards

The Personal and Employment cards provide a summary of the employee's personal details and current position.

5.2.1. Personal Card

The Personal Card contains limited personal information for your direct reports.

Personal

Known as **Example 1**

1 Year(s) 3 Month(s) in service

20988 (Personal ref.)

1001116 (Payroll ref.)

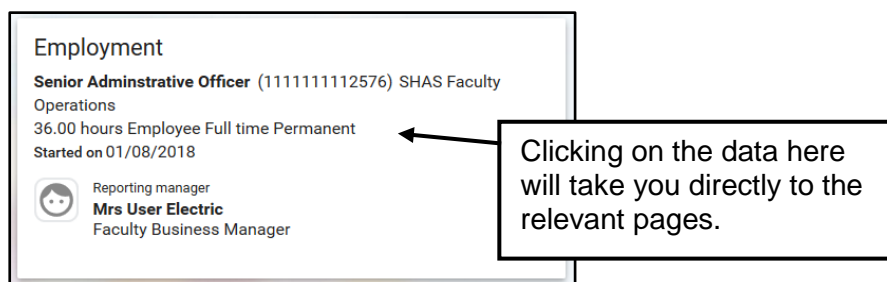
XX000001D (Social security)

✉ example1@gmail.com (Personal)

✉ example1.electric@stmarys.ac.uk (Work)

5.2.2. Employment Card

The Employment Card displays employment related information such as start date, job title, work patterns, probationary periods, and reporting units for your direct report(s).



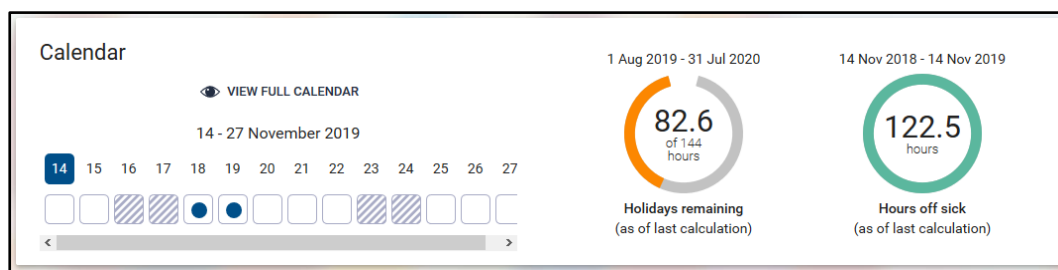
Employment
Senior Administrative Officer (111111112576) SHAS Faculty
 Operations
 36.00 hours Employee Full time Permanent
 Started on 01/08/2018

Reporting manager
Mrs User Electric
 Faculty Business Manager

Clicking on the data here will take you directly to the relevant pages.

5.3. The Absence Calendar

The absence calendar shows the employees working pattern for the next 14 days, absences will be indicated by blue dots in this view.



Calendar
 VIEW FULL CALENDAR
 14 - 27 November 2019

1 Aug 2019 - 31 Jul 2020
 14 Nov 2018 - 14 Nov 2019

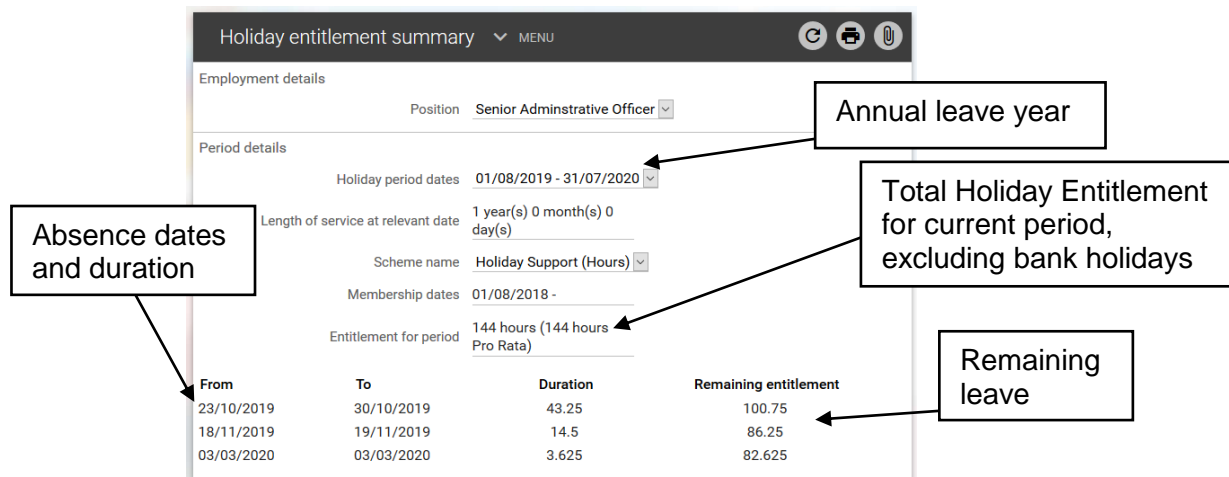
82.6 of 144 hours
 Holidays remaining (as of last calculation)

122.5 hours
 Hours off sick (as of last calculation)

5.3.1. The ‘gages’ display an up to date holiday balance and number of days sick within the selected period.

**The holiday balance displayed is the sum of the employee’s actual holiday entitlement + Bank Holidays and University closure days entitlement for part-time staff + holidays carried over from the previous year + any additional Holiday Buy days are also included in this entitlement.*

5.3.2. Clicking on the holiday gage takes you to the full **holiday entitlement summary page** where you can see details of all leave booked by an employee:



Holiday entitlement summary MENU

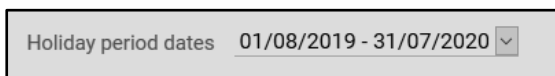
Employment details
 Position: Senior Administrative Officer

Period details
 Holiday period dates: 01/08/2019 - 31/07/2020
 Length of service at relevant date: 1 year(s) 0 month(s) 0 day(s)
 Scheme name: Holiday Support (Hours)
 Membership dates: 01/08/2018 -
 Entitlement for period: 144 hours (144 hours Pro Rata)

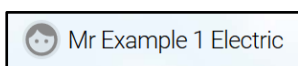
From	To	Duration	Remaining entitlement
23/10/2019	30/10/2019	43.25	100.75
18/11/2019	19/11/2019	14.5	86.25
03/03/2020	03/03/2020	3.625	82.625

Annual leave year
 Total Holiday Entitlement for current period, excluding bank holidays
 Absence dates and duration
 Remaining leave

5.3.3. You can change the annual year view to see both past, current and future records. To do this, click on the drop-down menu for **Holiday period dates** and select the relevant annual leave year.



5.3.4. Click on the employee's name at the top of the screen to navigate back to the Person Summary Screen

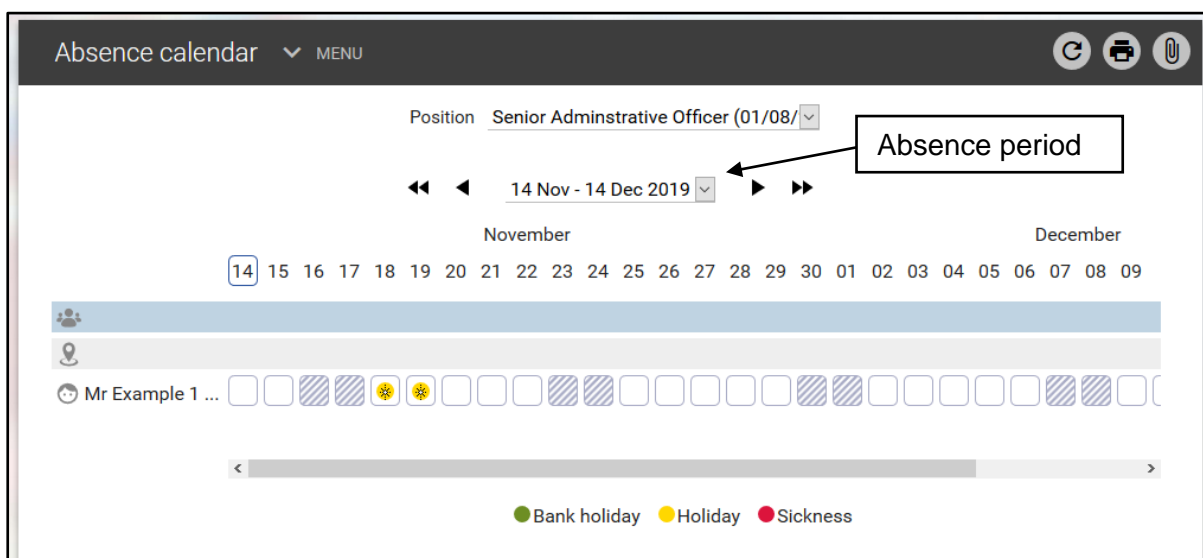


6. ABSENCE CALENDAR

The Absence Calendar allows you to view, approve, record and amend absence for your report(s). Absences will be indicated by coloured dots depending on absence type.

6.1. VIEW INDIVIDUAL ABSENCE CALENDAR

6.1.1. Clicking **VIEW FULL CALENDAR** from the Person Summary Screen will take you directly to the full absence calendar for the selected reportee.



6.1.2. In this view, you can select to view different positions or absence periods for your report(s) using the drop-down menu options available.

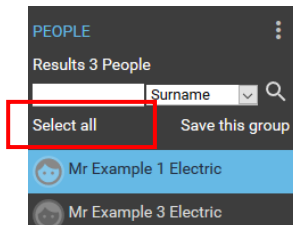
6.1.3. The different absence types are colour coded as below:

Bank Holiday	University closure days	Holiday
Sickness	Learning Activity	Other
Maternity/Paternity	Adoption	Working Pattern

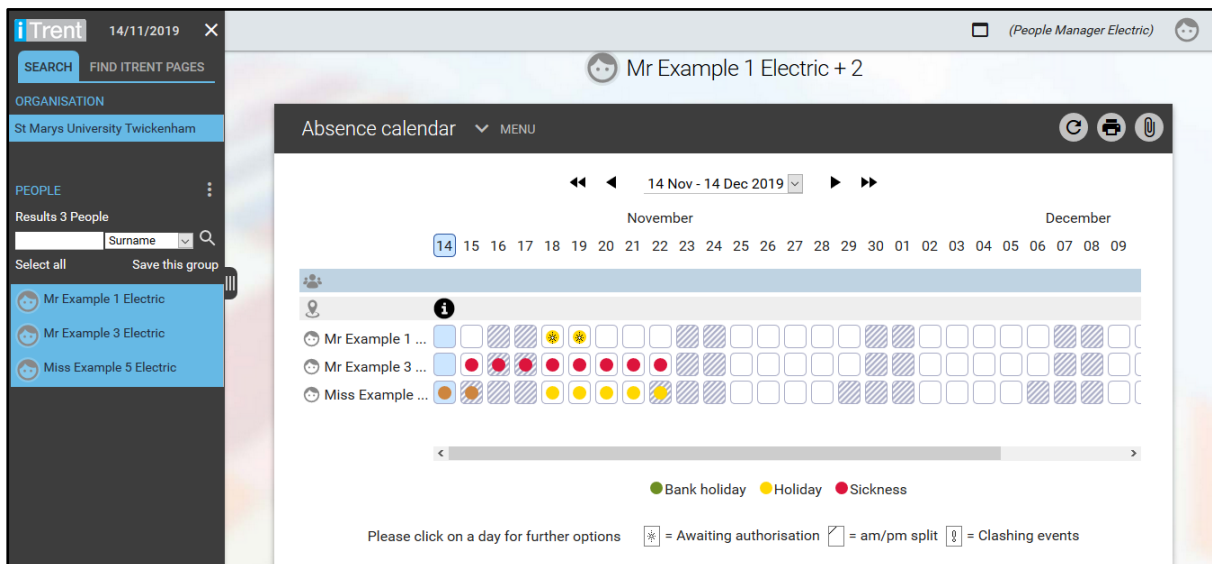
6.2. Full Team Absence View

The Absence Calendar also allows you to see all the absences relating to a group of direct reports.

6.2.1. To do this, click on **Select all** from the People Search menu on the left-hand pane of the Person Summary Screen:



6.2.2. This will highlight all your reportees. Clicking on **VIEW FULL CALENDAR** from the Person Summary screen will load your full team absence calendar for a specified period. This will bring up their availability in the same screen as shown below:

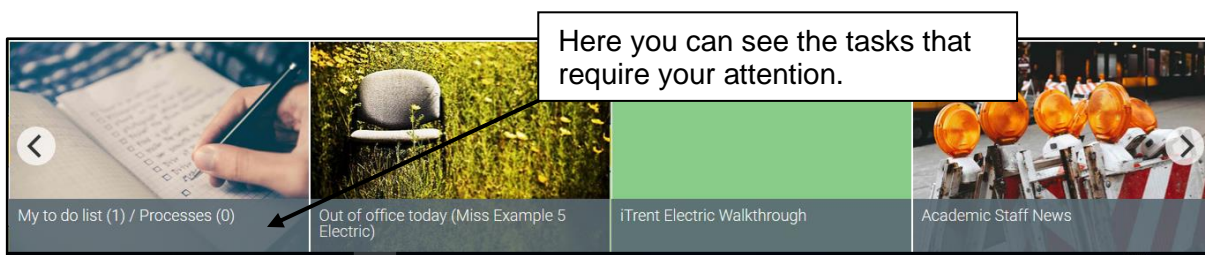


7. AUTHORISING ANNUAL LEAVE

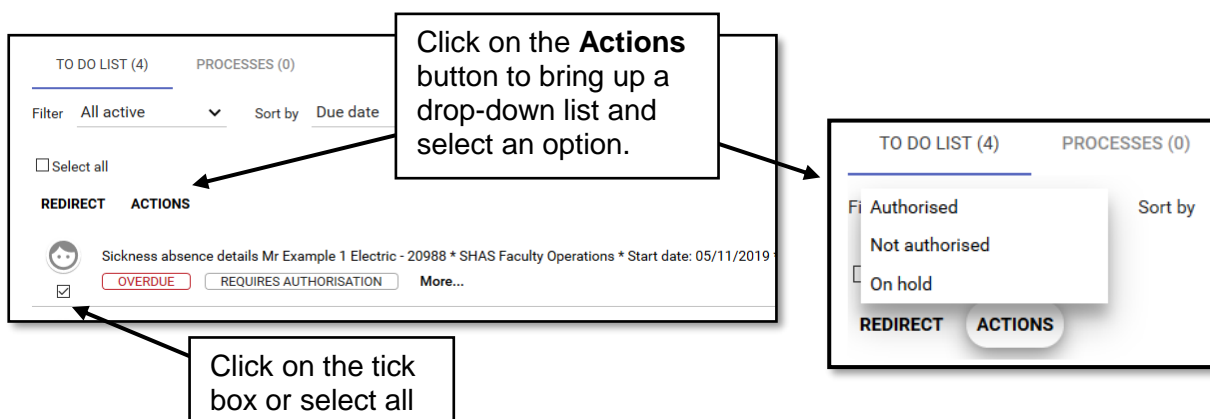
When a request for annual leave is submitted by an employee through PeopleNet – ESS you will receive an email request notification. The email prompts you to log into People Manager to view your outstanding tasks. There are two ways you can authorise leave:

7.1. AUTHORISING HOLIDAY REQUEST FROM YOUR 'TO-DO LIST'

7.1.1. Once you have logged in, click on the To-do list from the Carousel view on your PeopleManager homepage.



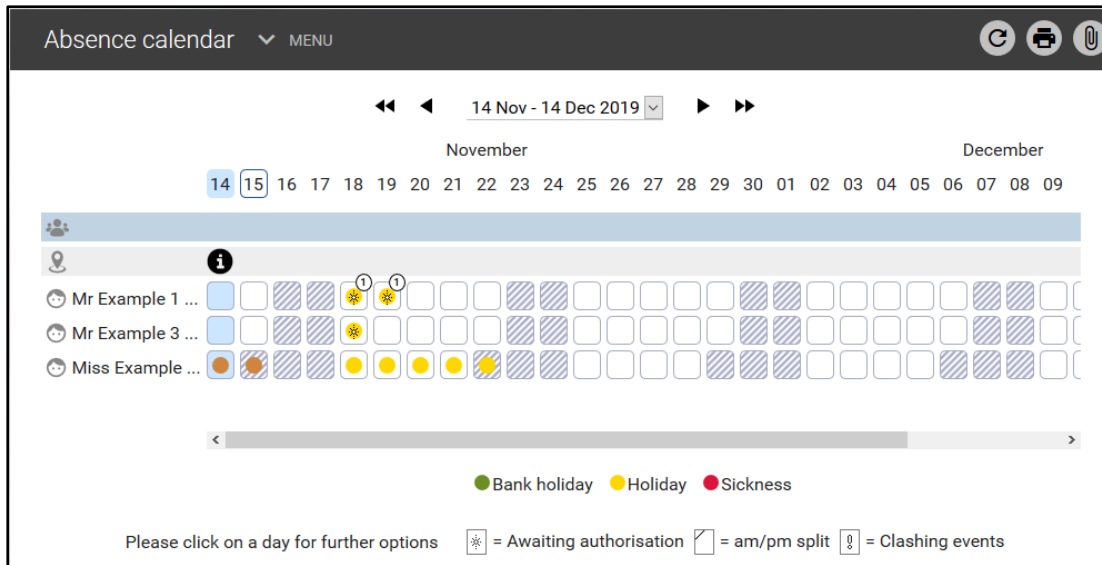
7.1.2. To action the task quickly, click on the tick box next to one or more item on the To-do list:



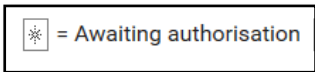
7.1.3. Select an authorisation status form drop-down list provided, the employee will also receive an email informing them of the outcome of their request.

7.2. Alternatively, to allow you to make a more fully informed decision you can authorise holidays by completing a **People search** for your employee and viewing their full **Absence Calendar** (refer to instructions above).

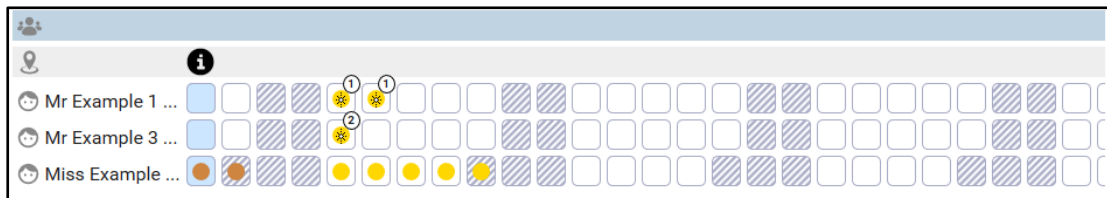
7.2.1. The Absence Calendar will allow you to authorise/reject the holiday request directly from the absence calendar by right clicking, negating the need for additional navigation.



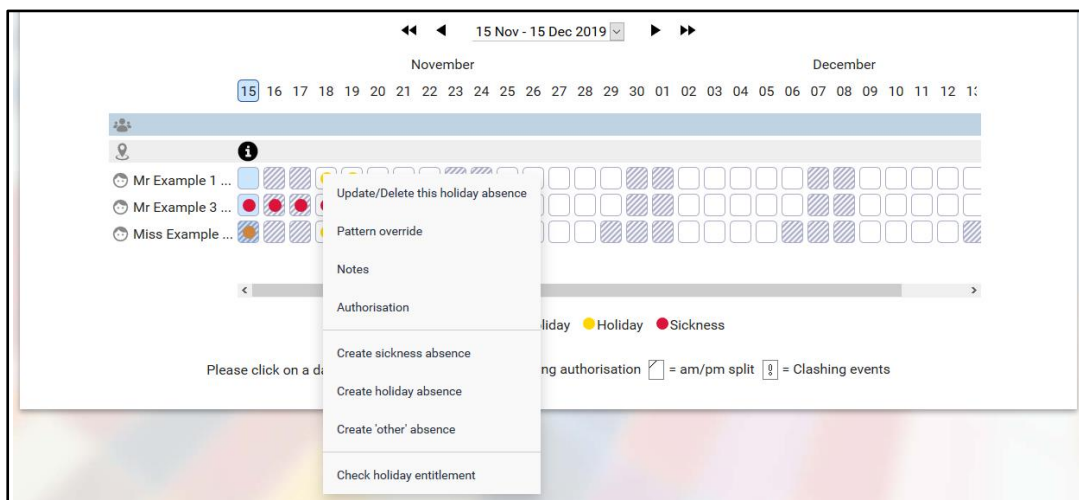
7.2.2. Holiday requests awaiting authorisation will be marked with a star.



7.2.3. As Manager you can now identify who booked their holiday first helping you to make an informed decision when authorising/rejecting the request. In the example below, the employee Example 1 has requested their holiday before Example 3.



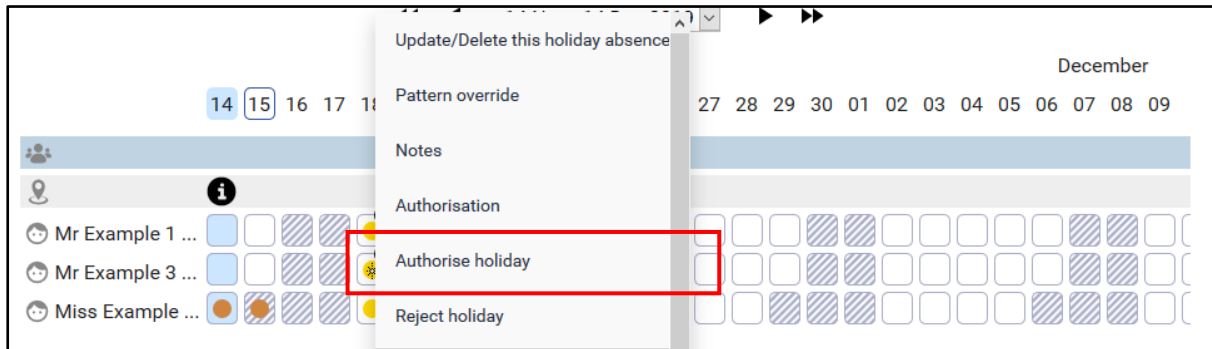
7.2.4. Right clicking on the holiday request (coloured dot) will display a drop-down menu providing you with a list of options against that holiday request.



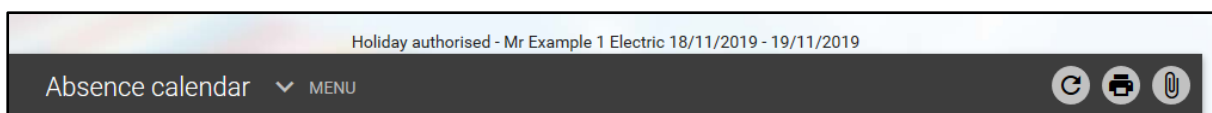
7.2.5. As Line Manager, you can Authorise/Reject/Hold the request, Update/Delete the request, and add Notes against the request.

7.3. AUTHORISING HOLIDAY REQUEST FROM ABSENCE CALENDAR

7.3.1. Right click on the coloured dot for the relevant holiday request and select **Authorise Holiday** from the drop-down list.

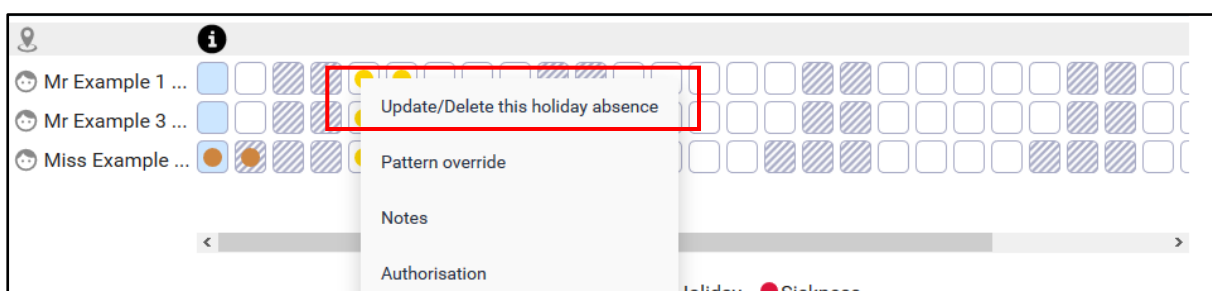


7.3.2. If the holiday has been successfully authorised/rejected, a notification will appear at the top of the screen to confirm the authorisation:



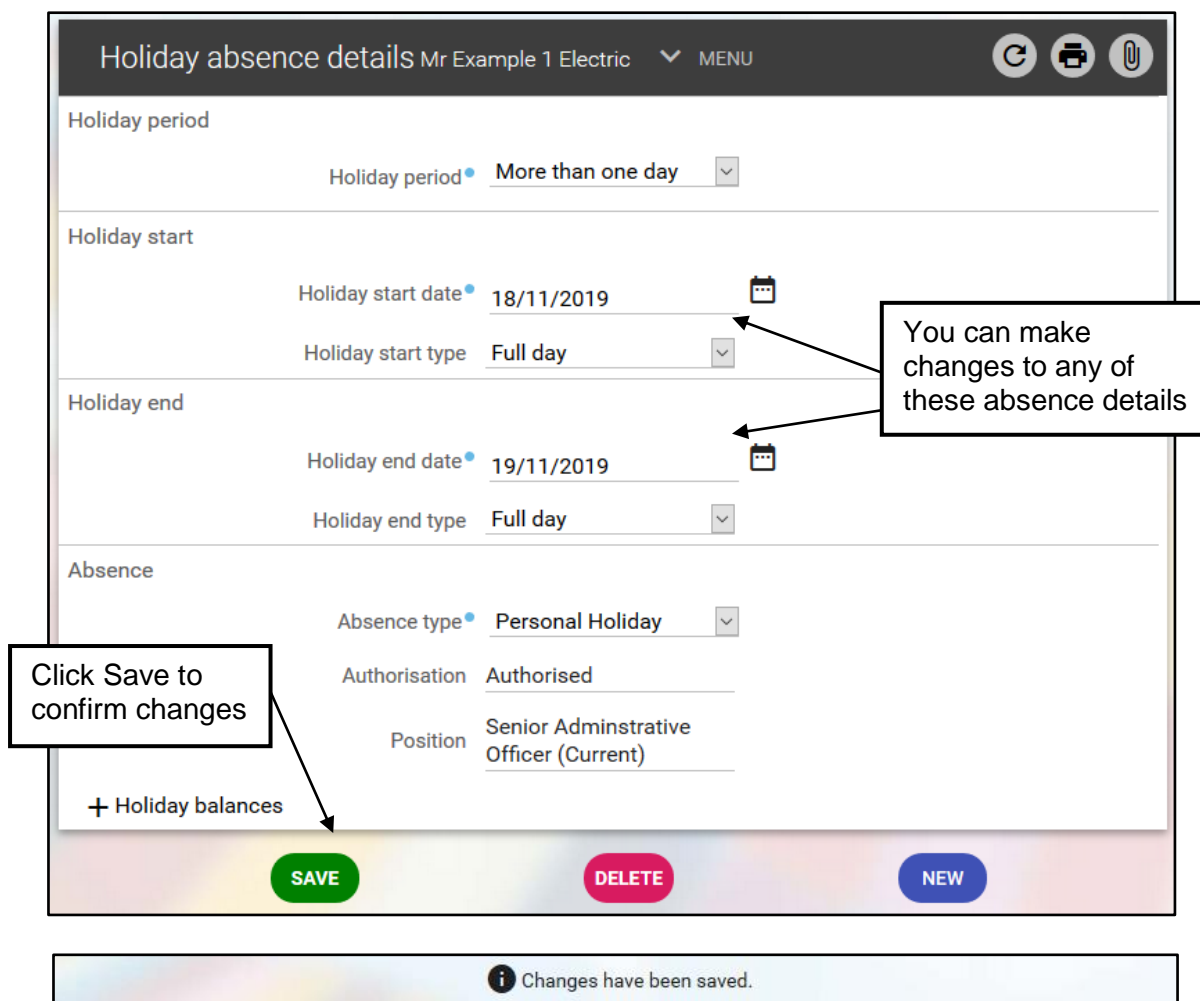
7.4. UPDATE/DELETE HOLIDAY REQUEST

7.4.1. A holiday absence request can be updated or deleted before and after authorisation. To do this, right click on the coloured dot for that absence and select **Update/Delete this holiday absence**.



7.4.2. This will take you directly to the Holiday Absence Details page for that record where you can amend the absence details:

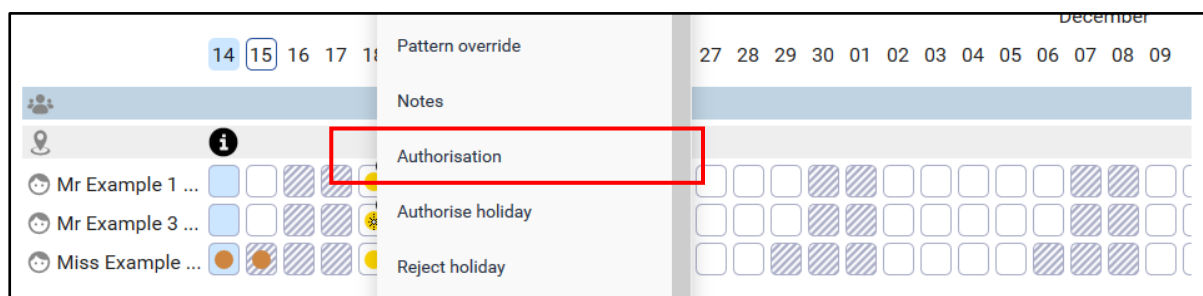
7.4.3. Once you have amended the absence details, click Save. The below notification will appear at the top of the screen confirming changes have been saved:



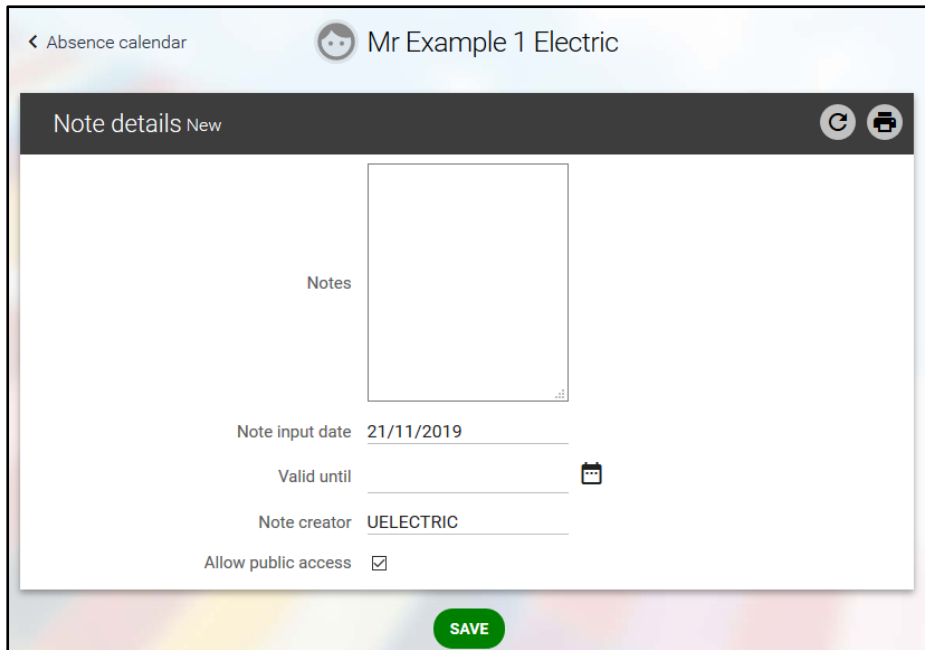
7.4.4. The employee will receive an email informing them their annual leave has been amended.

7.5. ADD NOTES TO HOLIDAY REQUEST

7.5.1. Right click on the coloured dot for the relevant holiday request and select **Notes** from the drop-down list.



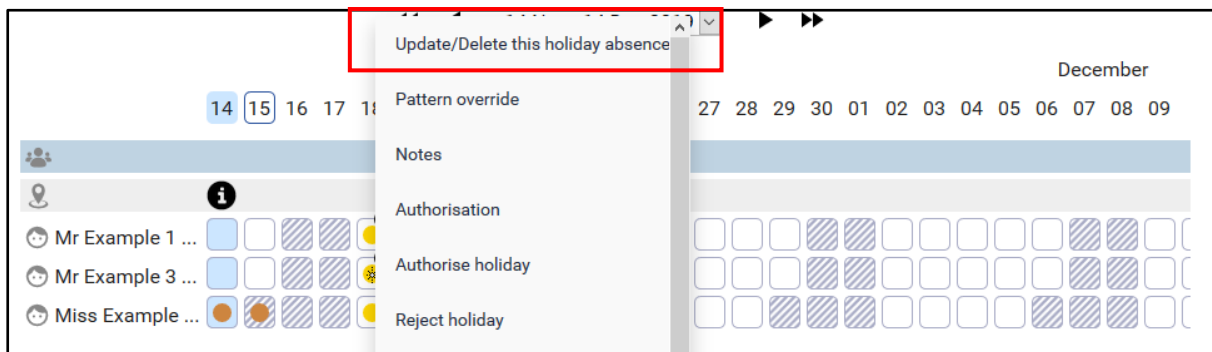
7.5.2 You can add notes to all types of absences. Click 'Save' once complete.



7.6. DELETING AN ANNUAL LEAVE REQUEST

You can delete future annual leave for your team member if it has not been taken or hasn't been authorised. Annual leave that has been authorised and taken cannot be deleted.

7.6.1. Right click on the coloured dot for the relevant holiday request and select **Update/Delete this Holiday Absence** from the drop-down list.



7.6.2. Absence details for the selected holiday record will display with an option to **amend** or **Delete** the record.

Holiday absence details Mr Example 1 Electric MENU

Holiday period
Holiday period • More than one day

Holiday start
Holiday start date • 18/11/2019
Holiday start type • Full day

Holiday end
Holiday end date • 19/11/2019
Holiday end type • Full day

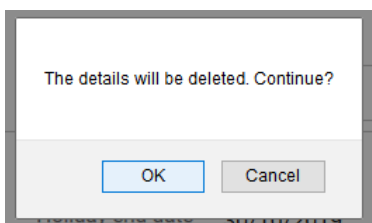
Absence
Absence type • Personal Holiday
Authorisation • Authorised
Position • Senior Administrative Officer (Current)

+ Holiday balances

SAVE DELETE NEW

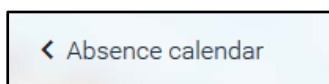
Click delete.

7.6.3. The following message will appear. Click 'OK'



7.6.4. The employee will receive an email informing them their annual leave has been deleted.

7.6.5. Click to go back to the 'Absence Calendar to view changes.

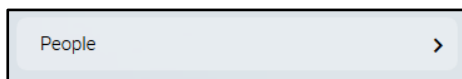


8. SICKNESS ABSENCE

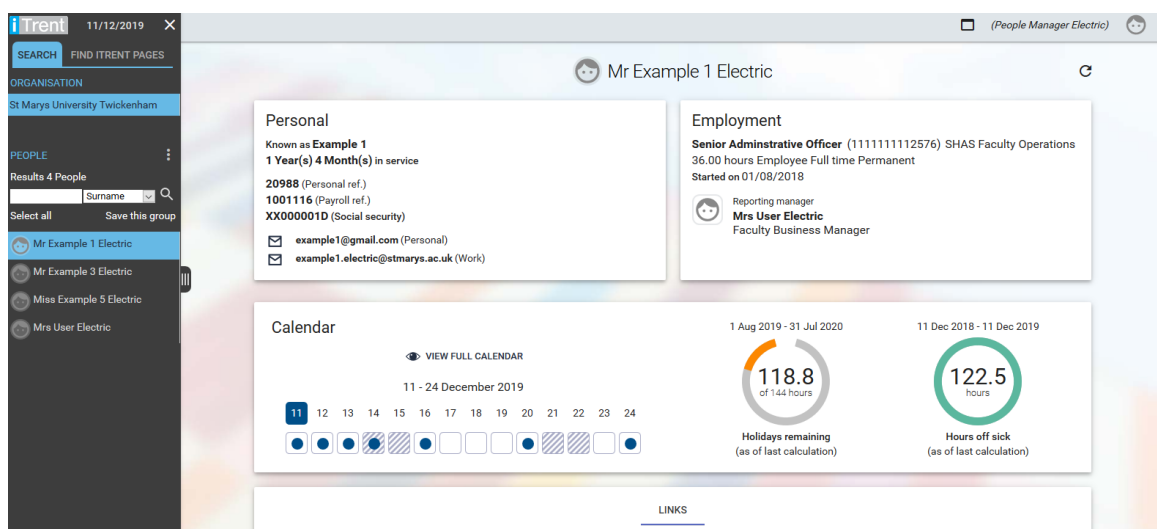
8.1. ADDING A SICKNESS ABSENCE

If under special circumstances your employee is unable to input their sickness absence, you as their manager can add the employee’s sickness absence on the system for them. To do this:

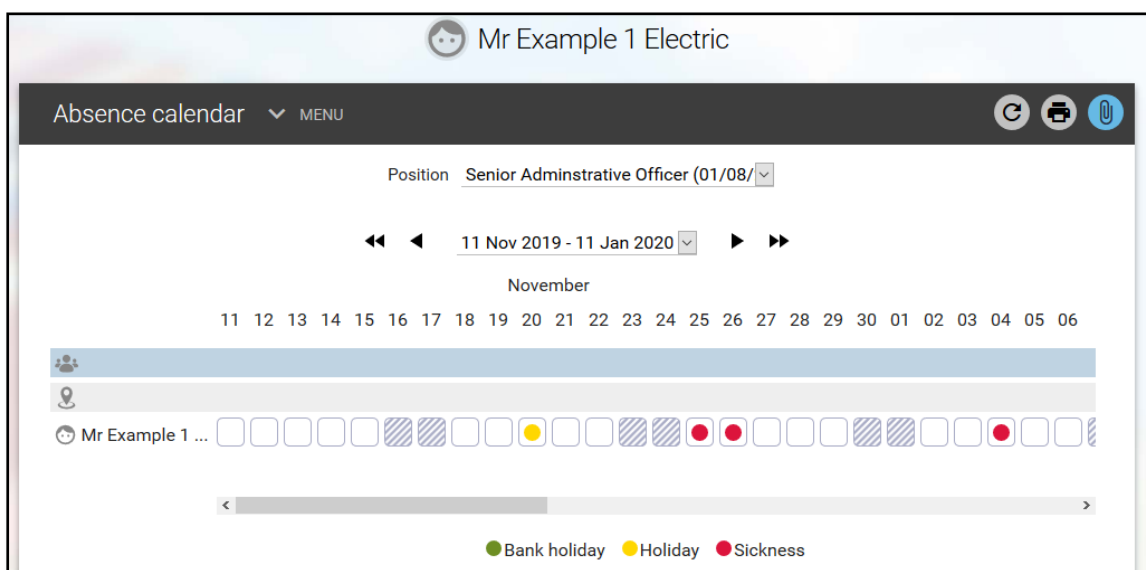
8.1.1. Click on the People section from your Homepage



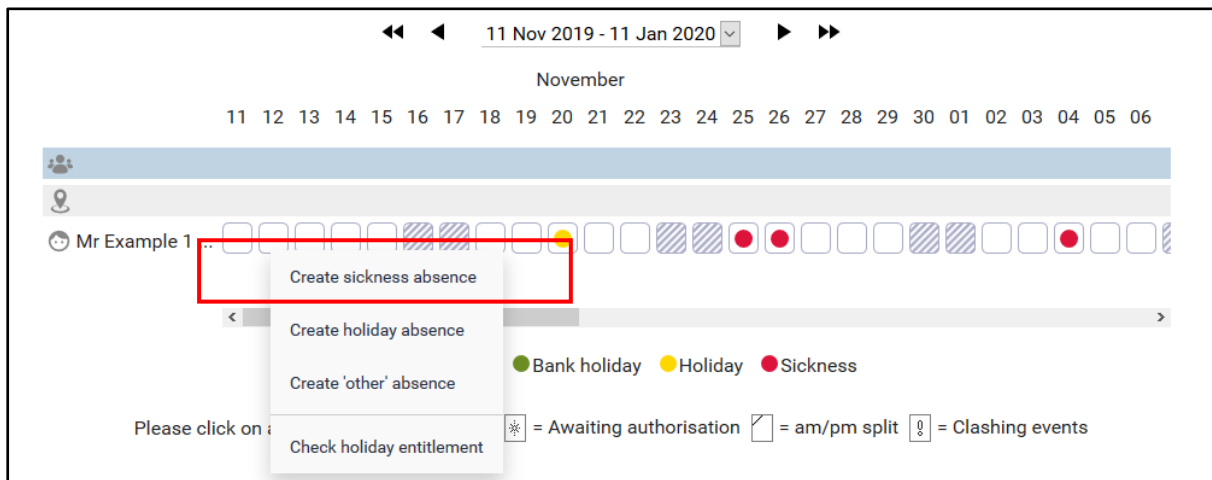
8.1.2. Do a blank search for your reportees on the left-hand pane and select the relevant employee to enter sickness absence for. Click on **‘View Full Calendar’** from the Person Summary Page.



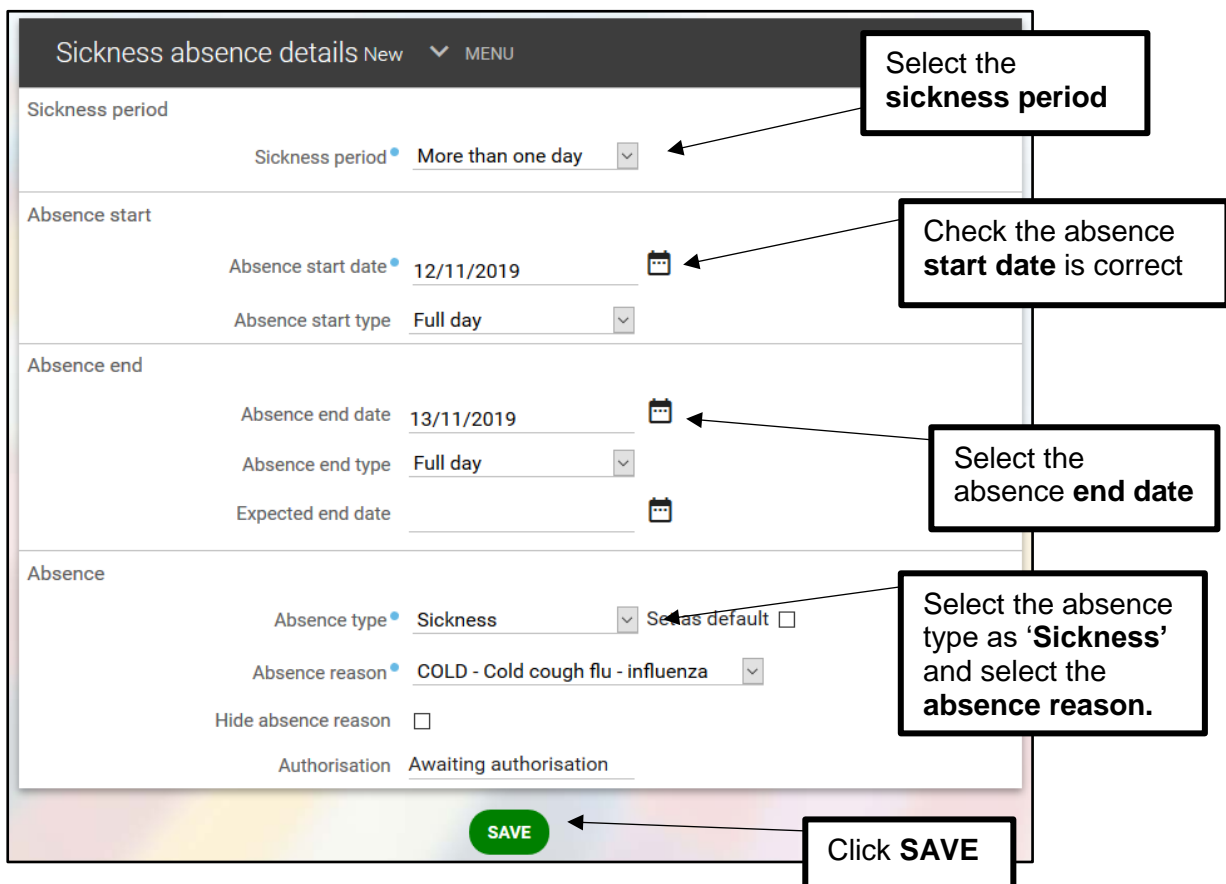
8.1.3. This will display the employee’s full absence calendar as shown below:



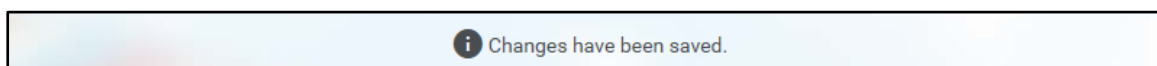
8.1.4. To enter sickness absence for this employee, right click on the start date of the sickness absence, in this case 12th November 2019, and select ‘**Create sickness absence**’



8.1.5. The Sickness absence details page will appear as shown below:

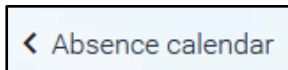


8.1.6. A notification will appear at the top of the screen to confirm the changes have been saved.

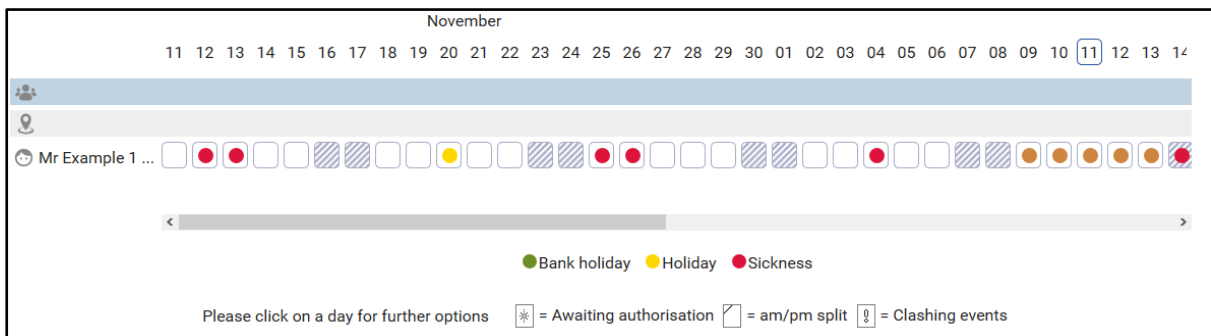


8.1.7. The employee will receive an email informing them their sickness absence has been authorised.

8.1.8. To view the absence on the main calendar, click on the **Absence Calendar** button at the top left-hand corner of the main screen:



8.1.9. The sickness absence will display on the calendar as red dots



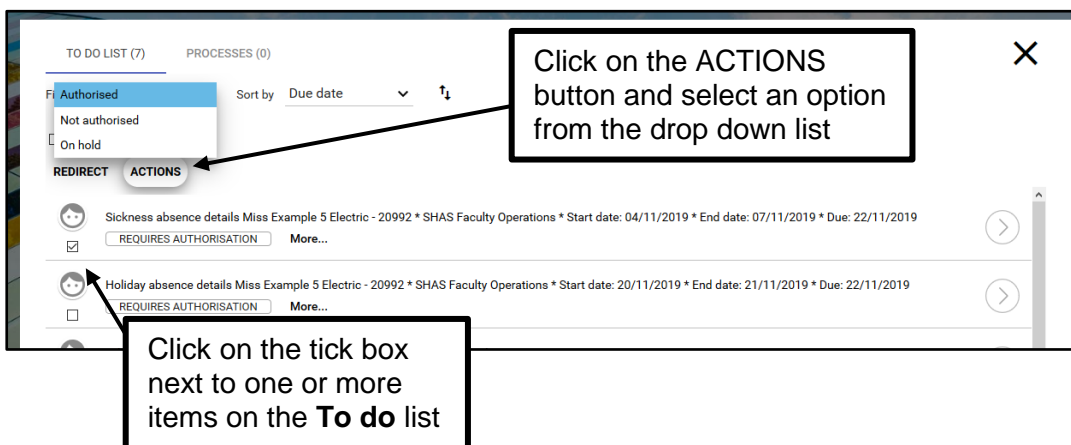
8.2. AUTHORISING SICKNESS REQUEST

You can authorise sickness absence in the same way as annual leave. When sickness absence is submitted by an employee through PeopleNet, you will receive an email request notification. The email prompts you to log into People Manager which you can do by clicking on the People Manager box on the right-hand side in the email notification.

8.1.1 Once you have logged in, click on the To do list panel in your Carousel view



8.1.2. Your outstanding tasks will display here.

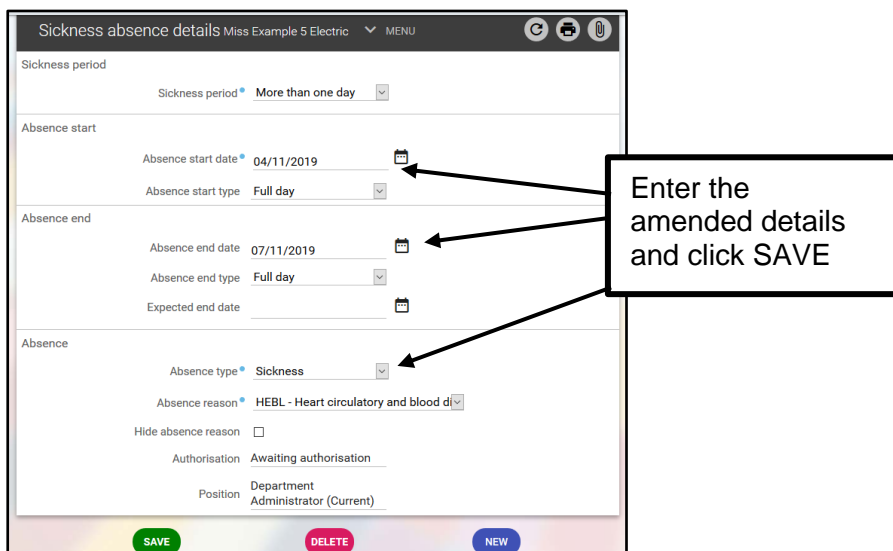


8.1.2 The employee will receive an email informing them their sickness absence has been authorised/not authorised.

8.3. AMENDING A SICKNESS ABSENCE

To amend a sickness absence, you will need to view the absence from the Sickness Absence Details page. To do this:

8.2.1 Click on the sickness absence from the **To-do** list. The following page will appear:

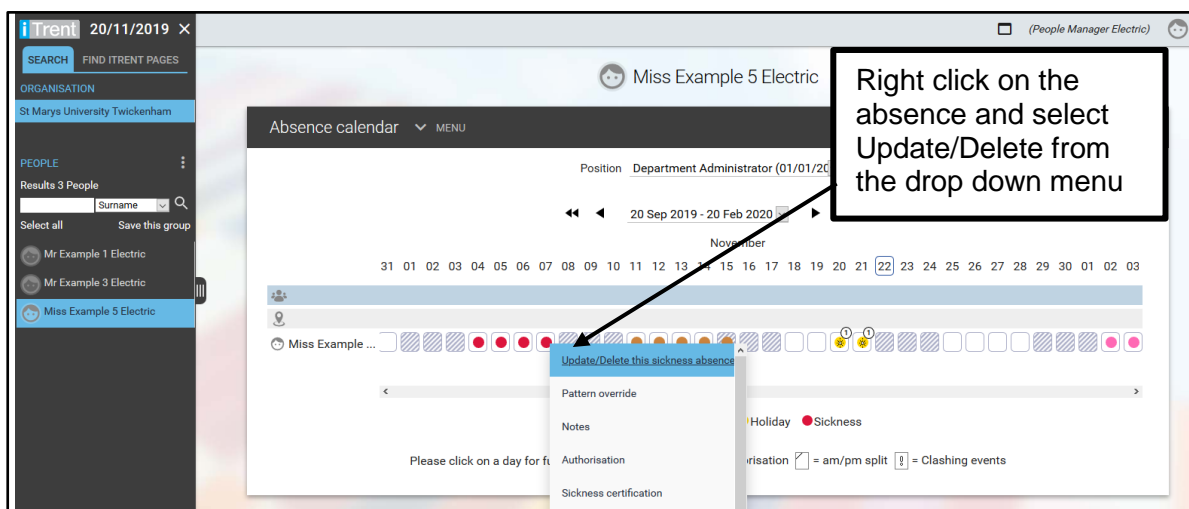


8.2.2. The employee will receive an email informing them their sickness absence has been amended.

8.4. DELETING A SICKNESS ABSENCE

You can delete future sickness absence that was entered incorrectly by your staff member. Sickness absences in the past cannot be deleted.

8.4.1. Select the absence that needs to be deleted from the **Absence Calendar**



8.4.2. Click **Delete**

The screenshot shows a web application window titled "Sickness absence details" for "Miss Example 5 Electric". The form is divided into several sections:

- Sickness period:** A dropdown menu set to "More than one day".
- Absence start:** Includes "Absence start date" (04/11/2019) and "Absence start type" (Full day).
- Absence end:** Includes "Absence end date" (07/11/2019), "Absence end type" (Full day), and "Expected end date".
- Absence:** Includes "Absence type" (Sickness), "Absence reason" (HEBL - Heart circulatory and blood d...), "Hide absence reason" (checkbox), and "Authorisation" (Awaiting authorisation).

At the bottom of the form, there are three buttons: "SAVE" (green), "DELETE" (red, highlighted with a red box), and "NEW" (blue).

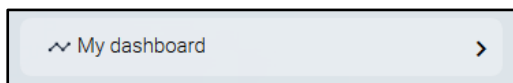
8.4.3. The employee will receive an email informing them their sickness absence has been deleted.

9. MANAGEMENT REPORTS

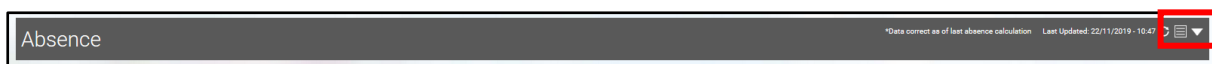
9.1. SICKNESS ANALYTICS DASHBOARD

This provides a graphical overview of your team’s absences and allows you to easily identify trends such as peak times of the year for absence and the most common reasons for sickness.

9.1.1. Select the **My Dashboards** link from the **Sections menu** on your Home Page.



9.1.2. This takes you to the manager dashboard page where you will see your available analytics. Click the downward arrow on your Absence dashboard to expand the Absence Analytics.



9.1.3. Your analytics dashboard will refresh and display the data shown below:

The dashboard displays the following data:

- Top sickness reasons*:** A bubble chart showing 'RESP_1 - Asthma' at 31% and 'Multiple reasons' at 8%.
- Highest sickness absence*:** A table listing employees and their sickness occurrences.

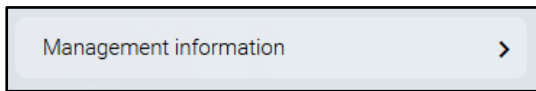
Employee	Sickness Occurrences
Example 3 Electric (Department Administrator)	4
Example 5 Electric (Department Administrator)	2
Example 1 Electric (Senior Administrative Officer)	2
- Sickness trend*:** A line chart showing absence trends by month. The y-axis ranges from 0 to 10. The x-axis shows months from Dec to Nov. The chart shows a peak in March (approx. 10), a smaller peak in July (approx. 3), and another peak in October (approx. 10). The legend indicates 'This year 25 days lost' and 'Last year No Data'.

Callout boxes provide the following instructions:

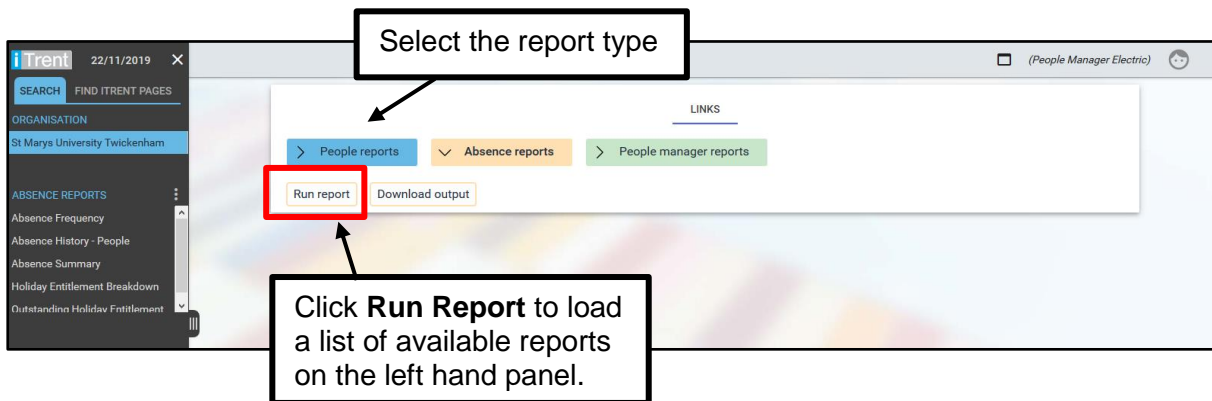
- Clicking on a bubble will show you the breakdown of sickness records for that absence type.
- Clicking on a specific time point on the sickness trend chart shows you the breakdown of who took sickness absence in that period.
- Here you can view the employee with the highest number of sickness occurrences. Clicking on the number will show you the breakdown of days that this individual has taken as sickness.

9.2 RUNNING BASIC REPORTS

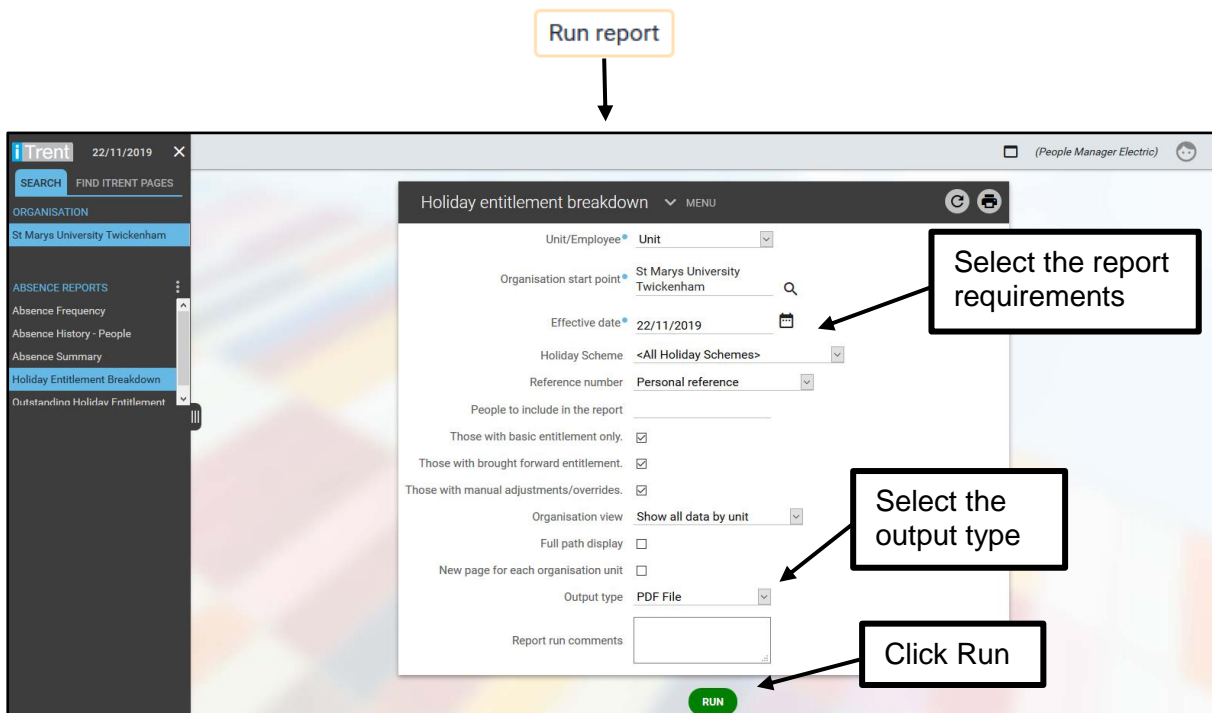
To run basic reports, go to your People Manager Home Page and select **Management Information** from the Sections Menu.



9.2.1 You can choose from the list of available reports. Further reports will be added.



9.2.2. Once the report list has loaded. Select the report you require from the left-hand panel and click on **Run Report** on the main panel. In this example we have selected the report 'Holiday Entitlement Breakdown' for the list of Absence report.



Organisation Start Point: Please choose the relevant School/Service using the search icon.

Organisation View: Recommendation is to leave this as **Show all data by unit**

Start Date and End Date: This will determine the time range for the data on the report

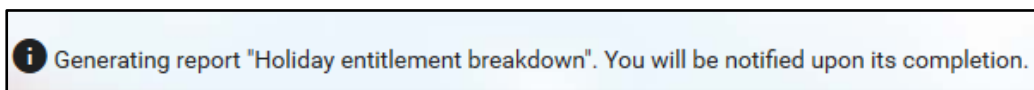
Show Details: You can either view the report as a summary or with details using this tick box.

Full Path Display: Checking this box will mean that the details of the report e.g. time and date of running will appear at the top of the report.

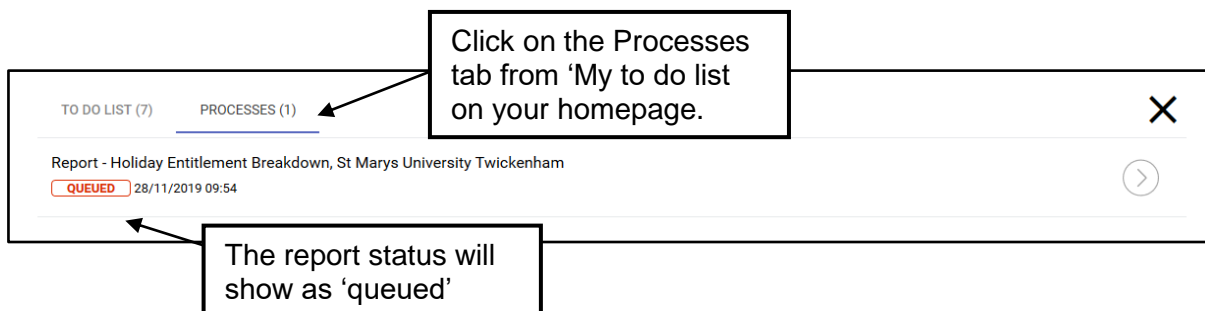
Output Type: You can choose between the report being in a PDF and a CSV (Comma Separated Value) format, which can be opened with Microsoft Excel.

Report Run Comments: You can add comments to a report here

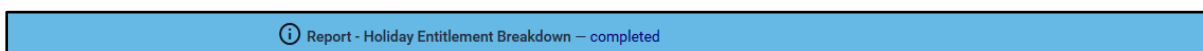
9.2.3. Once you have completed all the fields, click 'Run'. The report will run in the background and a pop-up notification will appear at the top of the screen indicating the report is generating.



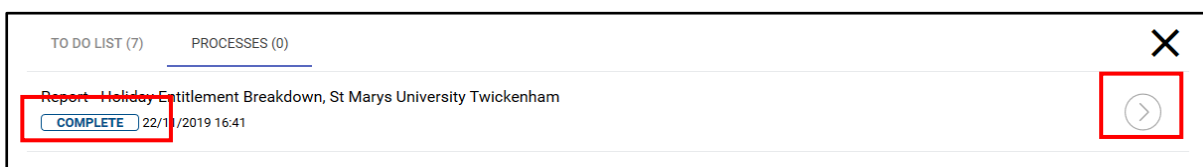
9.2.4. You can also check the status of your report from the To-do list.



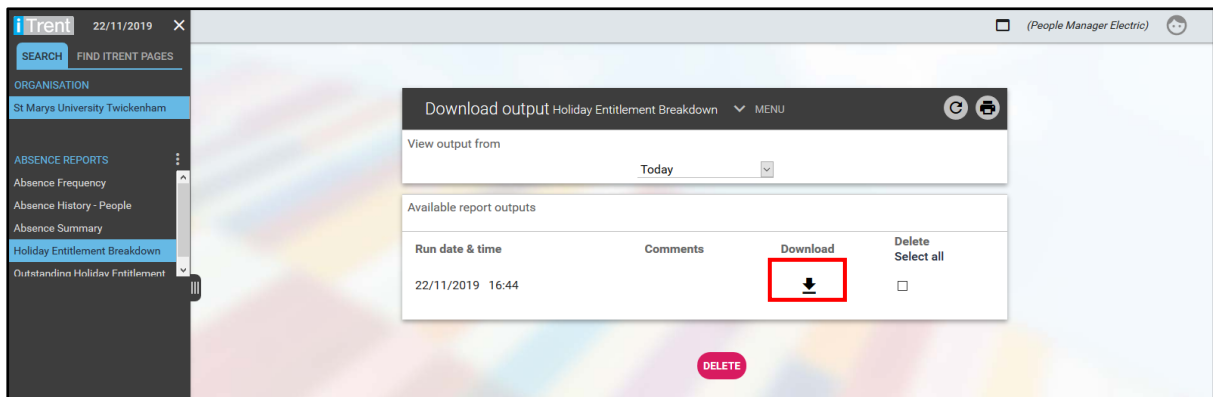
9.2.5. A notification will appear at the top of the screen when the report has completed.



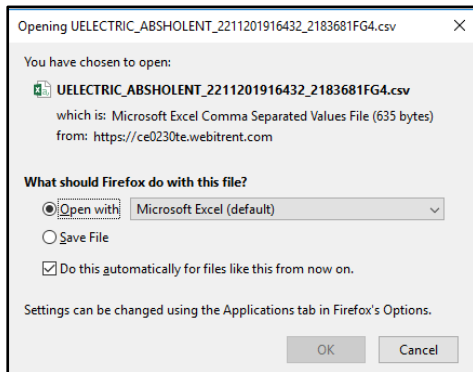
9.2.6. You can also go back to the Processes tab in your To-do list to check if the reports has completed.



9.2.7. Clicking on the arrow in your To-do list will take you to the **Download Output** page where you can download your report.



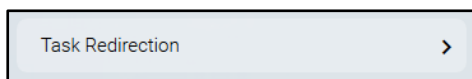
9.2.8. Click on the download arrow to download your report. The following window will appear enabling you to open and save the report in your drive.



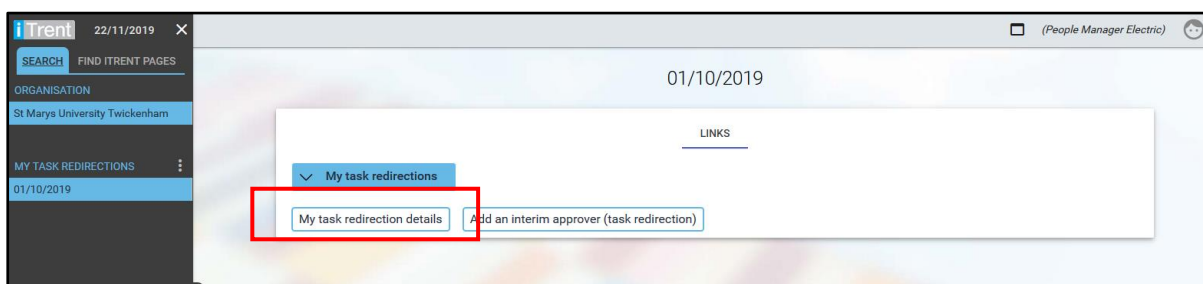
10. REDIRECTING TASKS

10.1. If you are going to be away for any period of time, you can arrange for requests to be re-directed to an appropriate manager with equal security access in your team who can action in your absence.

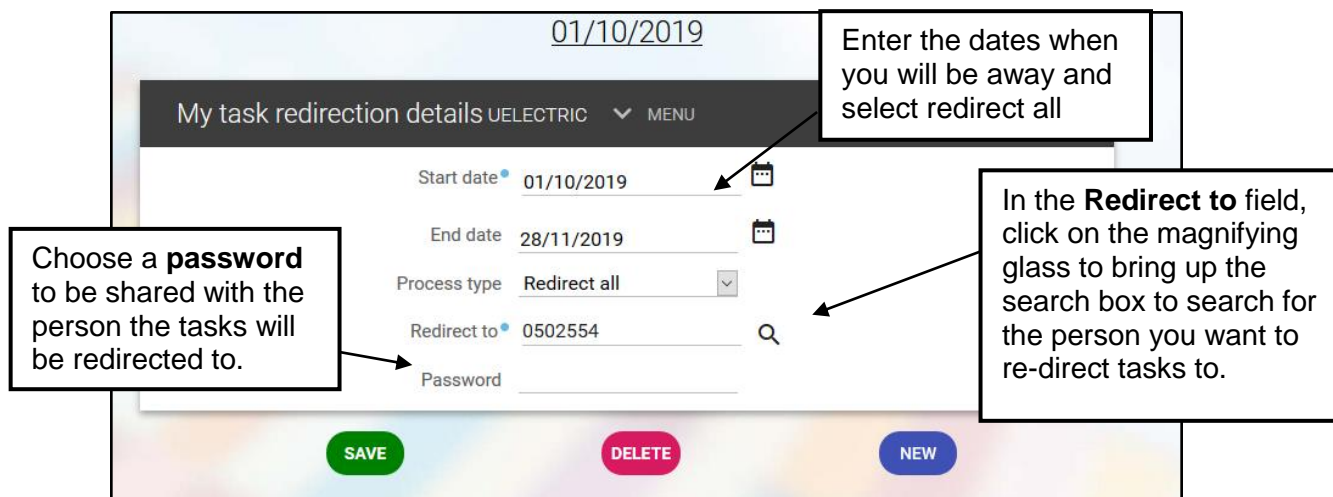
10.1.1. Select **Task Redirection** from the Sections Menu on your Home Page.



10.1.2. Click on the **My Task Redirection Details** link



10.1.3. The **My Task Redirection** page will allow you to add details for your tasks to be redirected. Add the relevant criteria and click **Save** to redirect you chosen tasks (or all task) for the selected redirection period.



10.1.4. Your colleague will receive an email informing them that you have re-directed a particular task. You will need to make them aware of the password as this will not be included in the email.

NOTE: As the data is People Manager is driven from the HR and Payroll systems, tasks should only be re-directed to an appropriate manager in your team who has equal security access to People Manage.

For further information please contact hrrsystems@stmarys.ac.uk.