RBWM

iTrent Employee Self-Service Guide

Version 1.1

Author: iTrent Team

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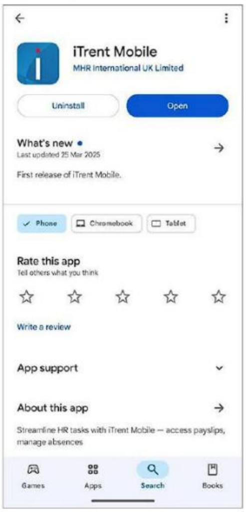
1. iTrent Mobile App User Guide

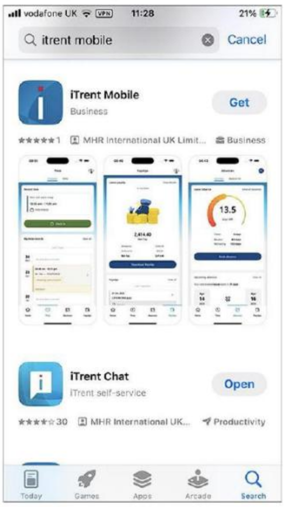
1.1. Downloading the app

The iTrent mobile app is available on the Apple App store and Google Play store:

Play store
Compatibility: OS is Android 10 and up

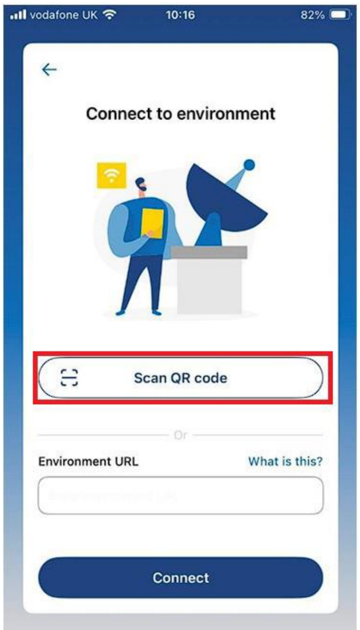


App store
Compatibility: iOS - Version 16+



1.2. Connecting to RBWM iTrent

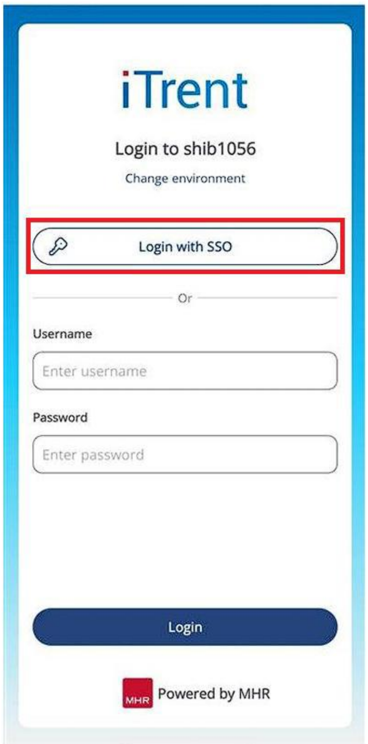
Once you have downloaded the iTrent app, open the app and you will be presented with a ‘Connect to environment’ page.



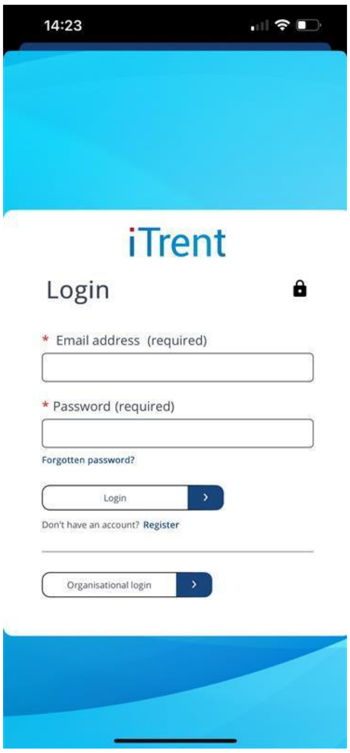
To connect to iTrent, you can click on ‘Scan QR code’ and then scan the below QR code with your mobile device’s camera.

1.3. Login

You will need to log in using the same method that you currently use to log into Employee Self-Service on the web. Click on 'Login with SSO'.



The familiar ESS login page will be displayed, and you can log in the usual way.



Please follow the steps on the next page to assist you with logging in.

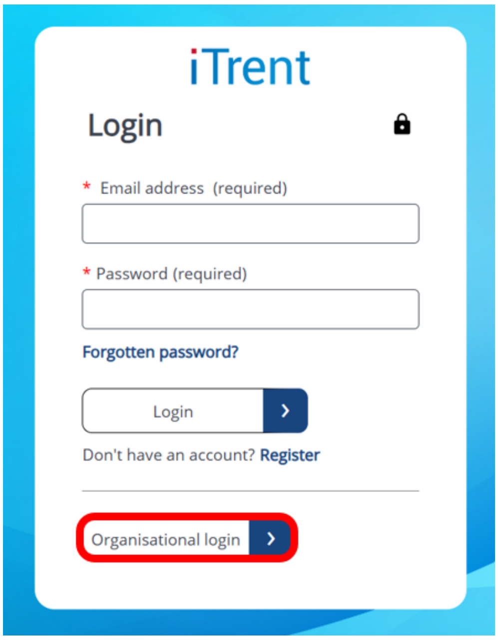
1. Logging In

Open your web browser and go to: myselfservice.rbwm.gov.uk

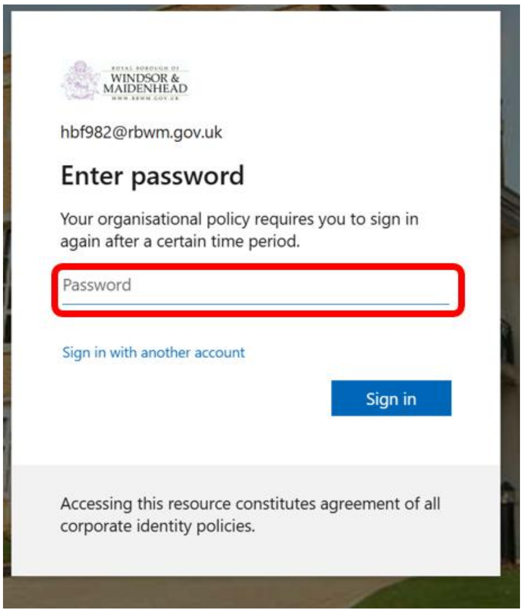
Alternatively on your mobile device you can scan the QR code below to access the login page.

SCAN ME

Select 'Organisational login'.

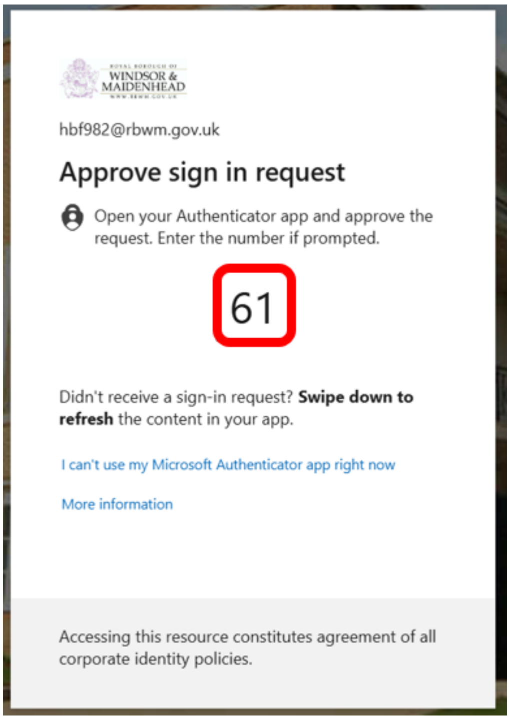


Input your corporate password, this is the same password you use to access your work laptop.



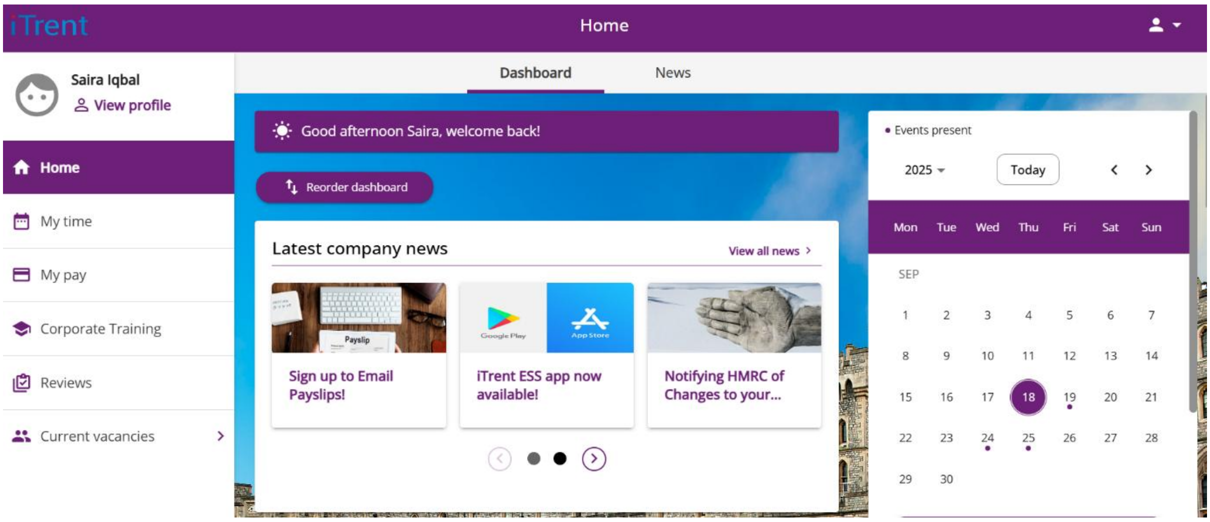
You will be prompted approve your sign-in request. To do this, open your authenticator app and follow the instructions on screen to input the number displayed on the iTrent login page.

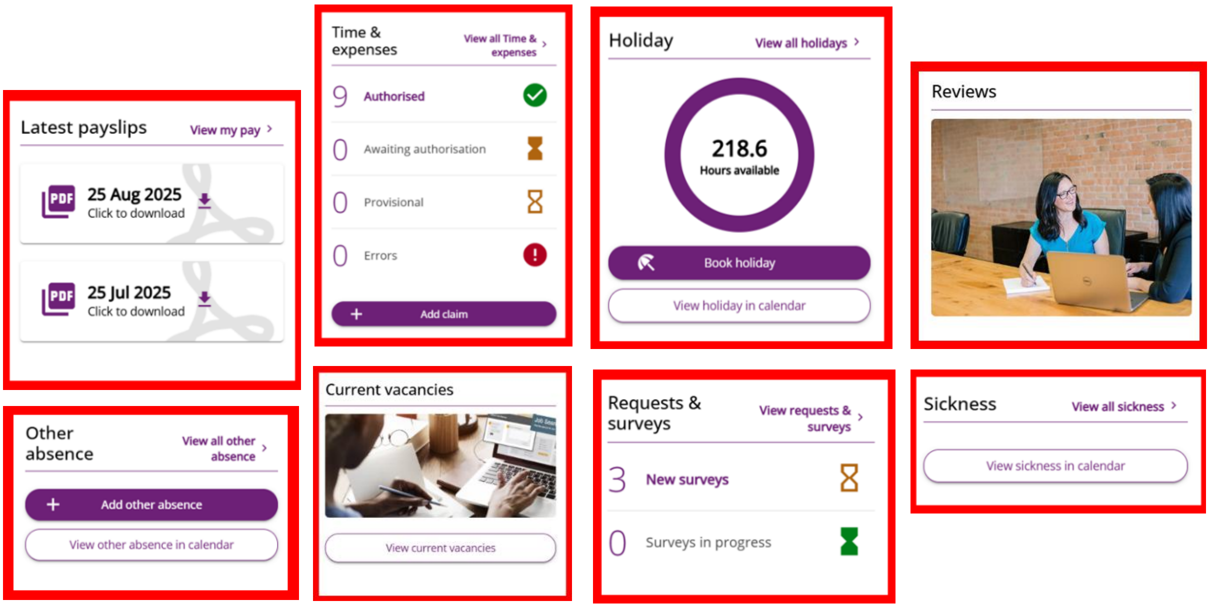
Please note, the number in the screenshot below is for the demonstration purposes only.



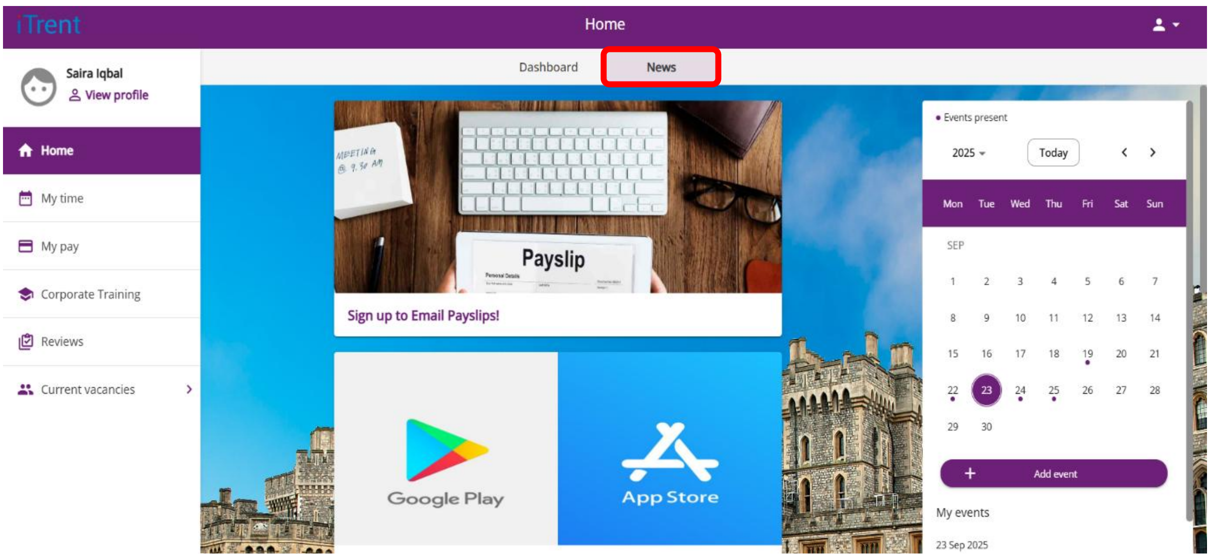
2. Home

Once you've logged in, you will be presented with your home screen dashboard. Featuring widgets like 'Holiday' and 'Time & Expenses' (highlighted in red below). For this guide, we'll be focusing on the navigation menu located on the left-hand side of the screen.





Click on the 'News' tab to access the latest company updates and articles.

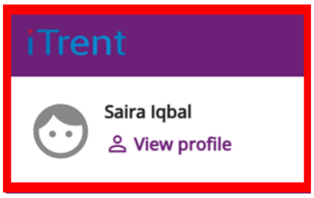


3. Profile

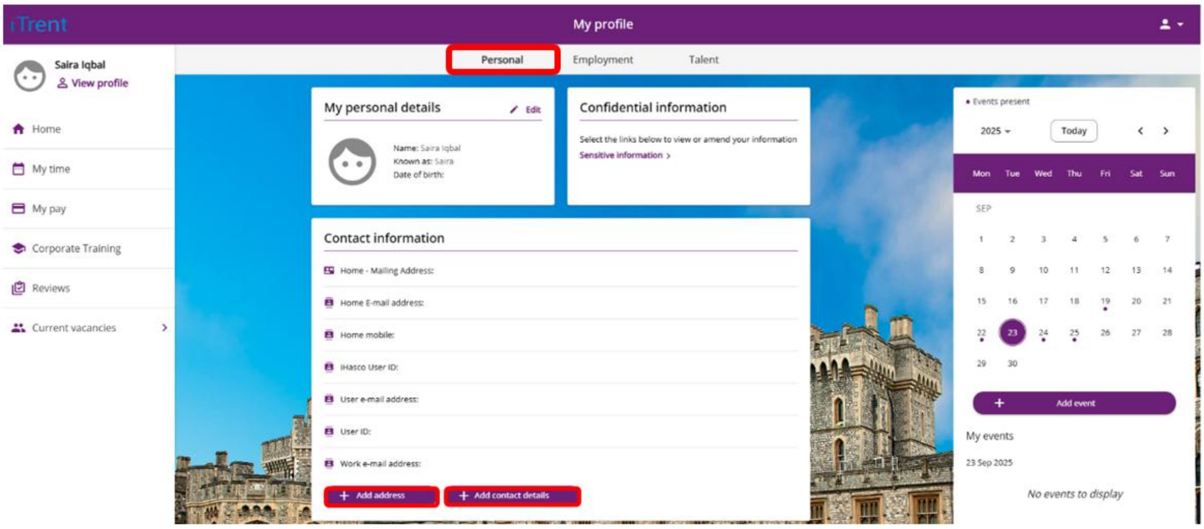
This section is used to access your personal information such as home address, sensitive information, emergency contacts and bank details.

3.1. View profile

Select 'View profile' in the top-left corner of the screen.

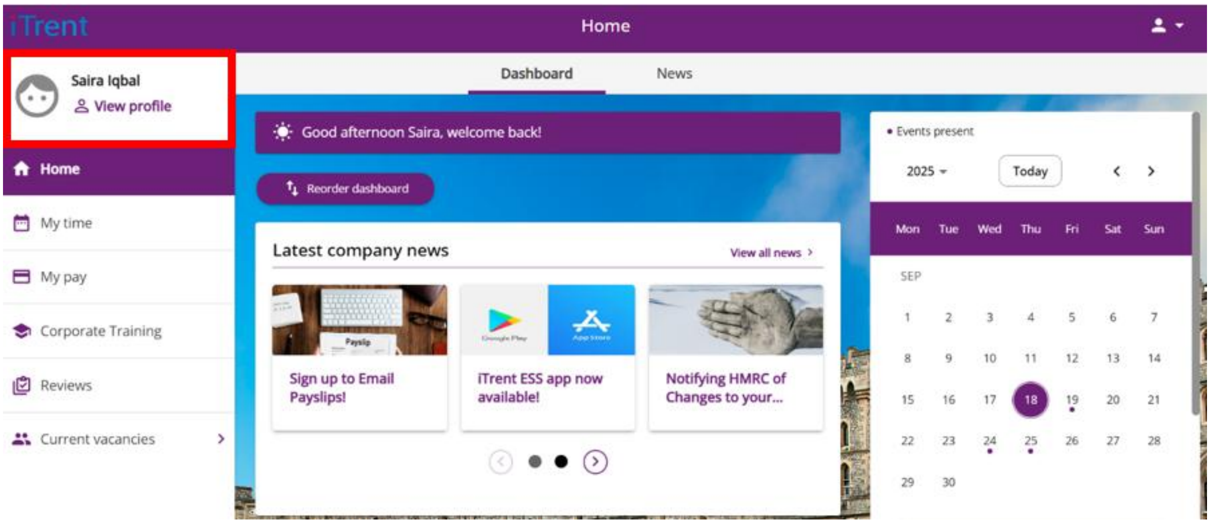


Once you have selected 'View profile', you will be able to see all available information relating to you as an individual. To amend the information on 'My personal details', click 'Edit'. For Confidential information, you will need to click on the link in the widget. To add an address or add contact details, select '+ Add address' and '+ Add contact details'.

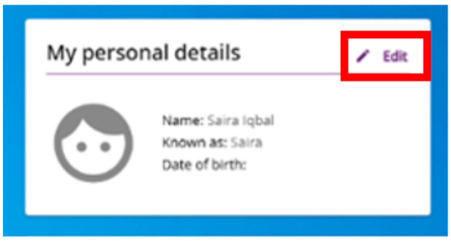


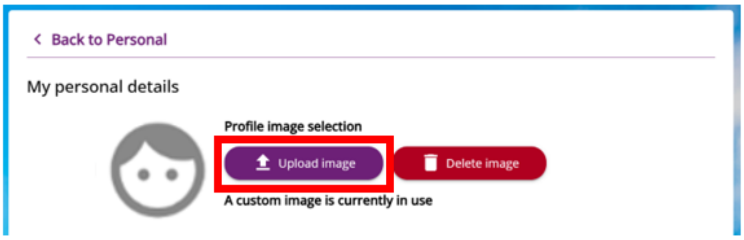
3.2. Upload your profile photo

Click 'View Profile'.



Click the Edit button, then select Upload Image. Your device's file browser will open, showing your saved documents. From there, choose an image file that you've previously saved to your device.

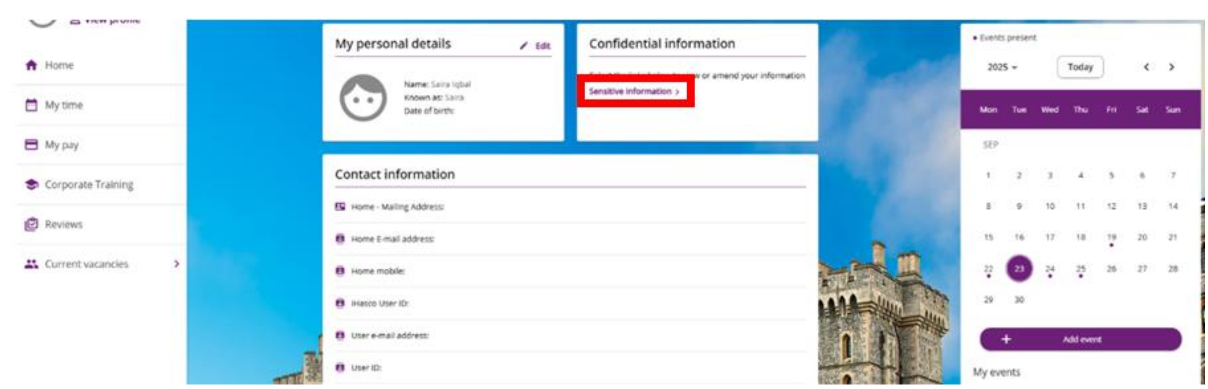




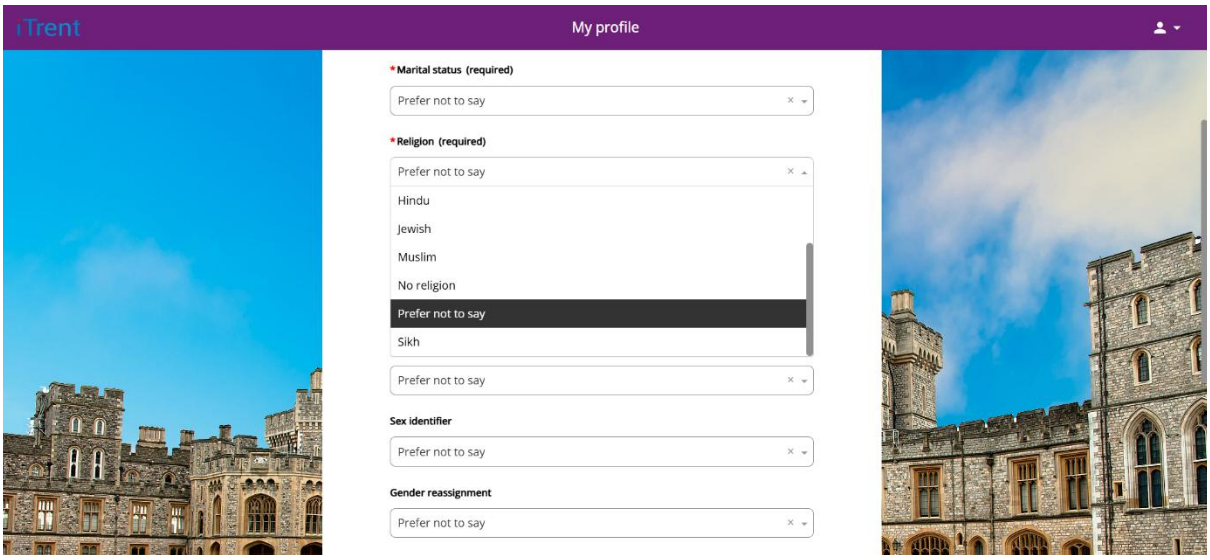
To ensure your image uploads successfully, scroll to the bottom of the screen and click 'Save'. The upload won't be completed until this step is taken.

3.3. Updating confidential information

Click 'Sensitive information' highlighted below and the form will appear. Complete the fields marked with an asterisk (*). Ensure you save the form once completed.



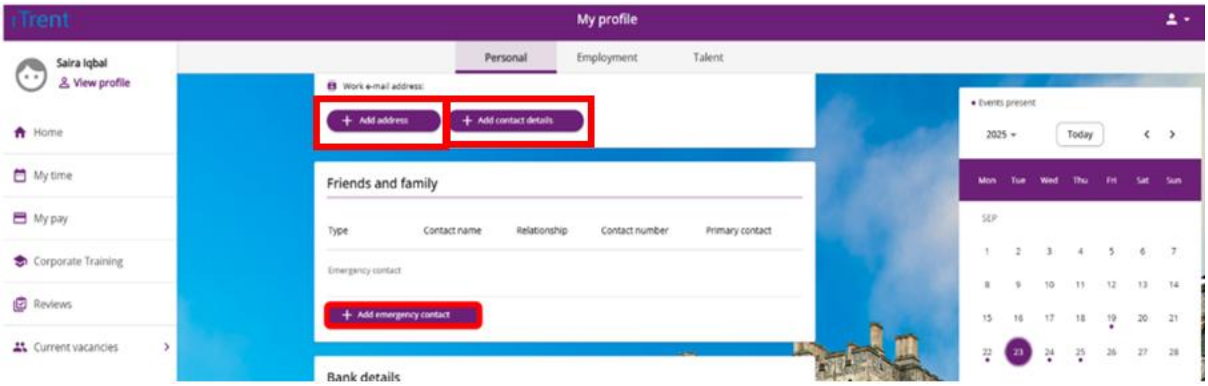
Please note that each dropdown menu on the Confidential Information page includes a 'Prefer not to say' option, allowing you to withhold any information you'd rather not disclose.



3.4. Updating other personal information

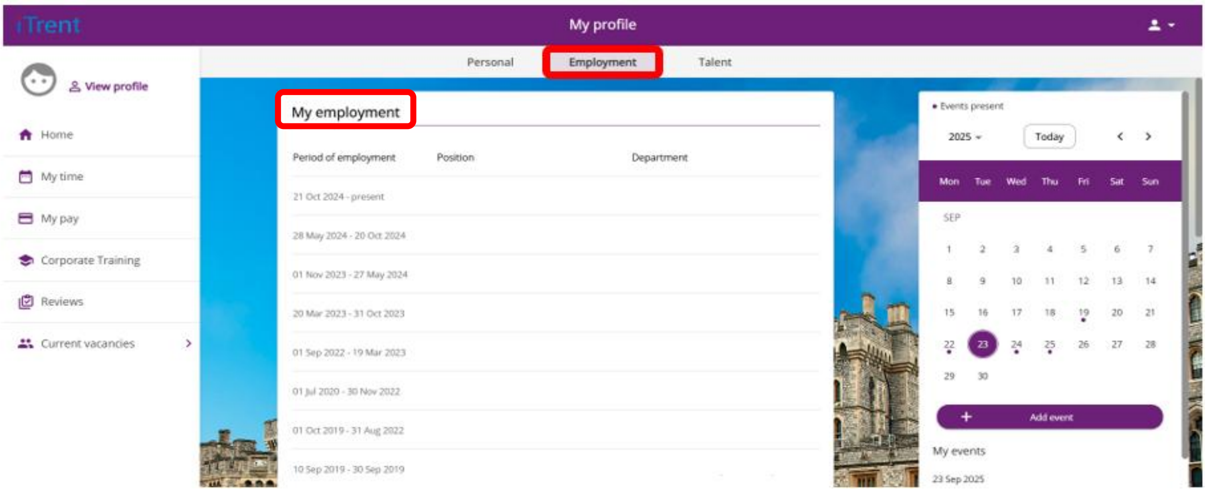
To update your other personal information such as contact details and friends and family information, simply click '+ Add .....'. You will be required to fill out the fields on each form that populates after doing so marked with an asterisk (*).

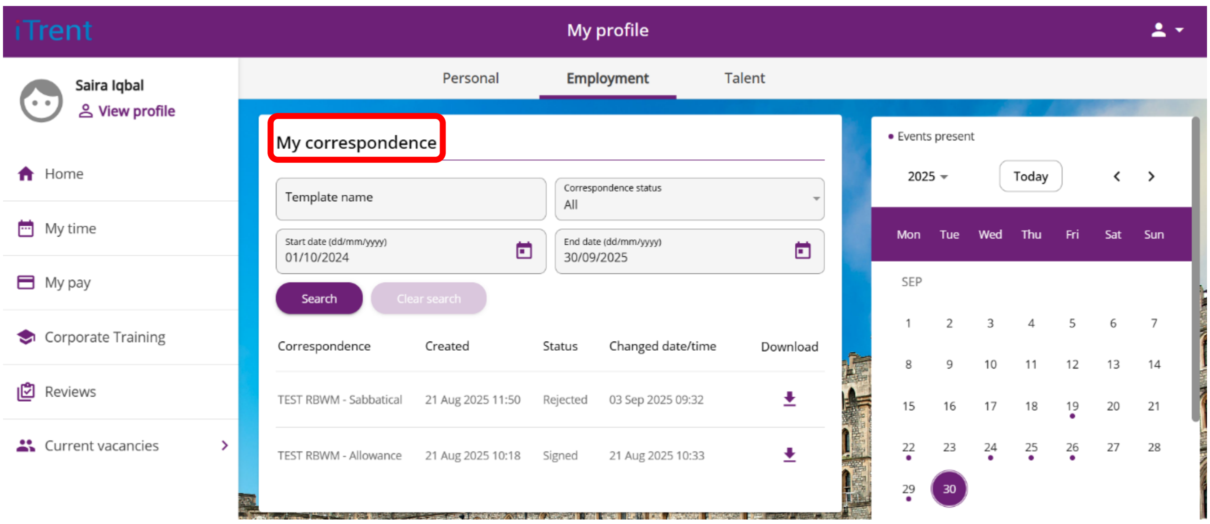
Please note, once you have completed the relevant fields in each section, you must select 'Save' for your changes to be updated.

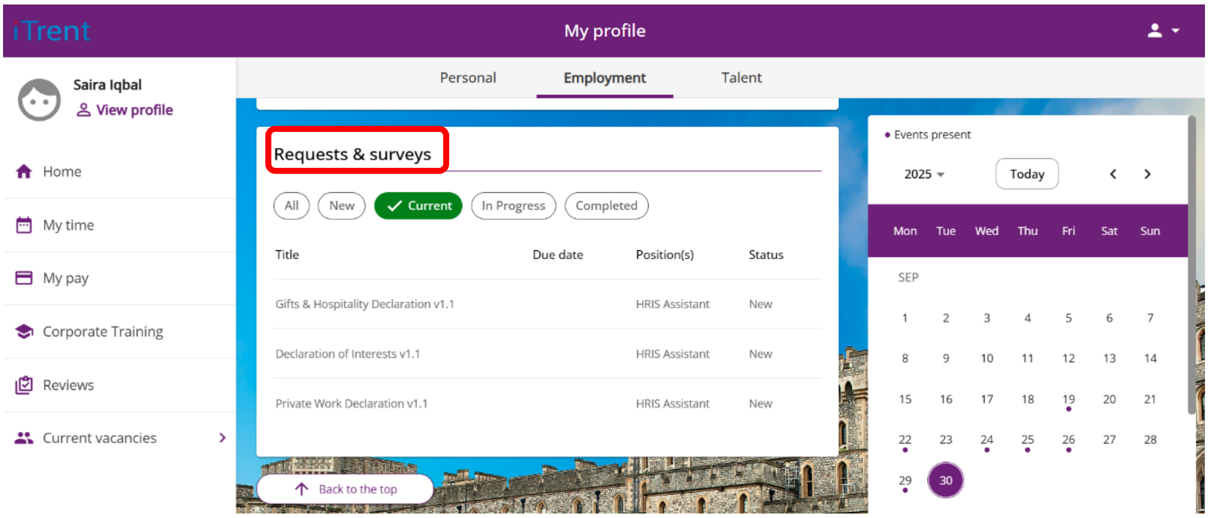


3.5. Employment history

To view your employment history, correspondence and surveys, select 'Employment'. See below.



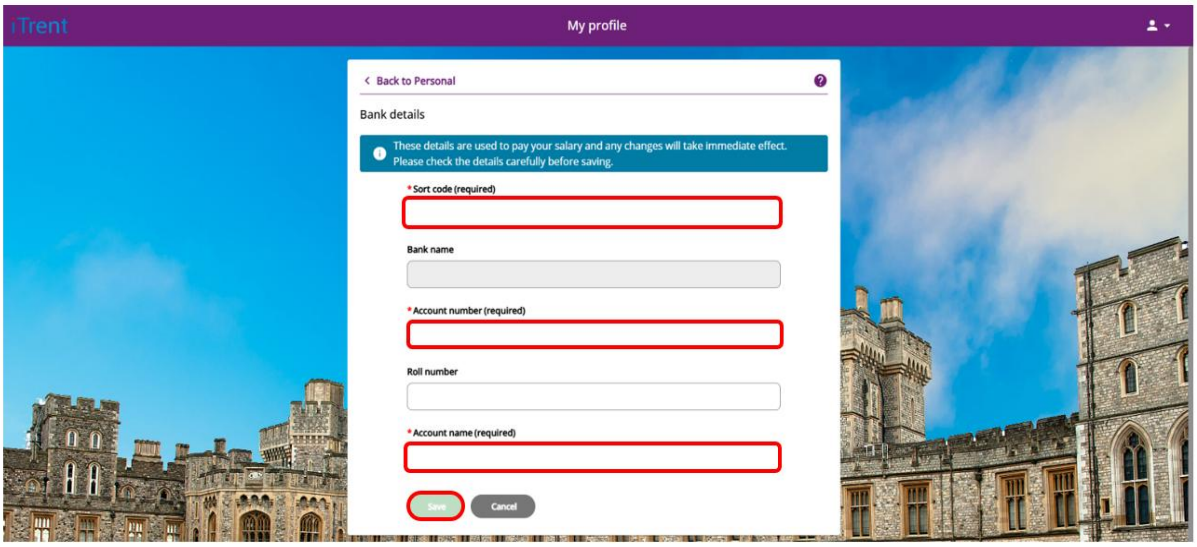




3.6. Updating bank details

To update your bank details, you'll need to type over your existing information by entering a new Sort Code, Account Number, and Account Name. This will replace your previous bank details.

Please note, once you've entered the new information, click 'Save' to complete the update. The bank name will automatically populate only after the changes have been saved. If you do not click 'Save', the bank name will not appear.



4. My Time

Important note: As you reach the end of your holiday year, any remaining balance up to 5 days will be automatically carried over into the next leave year. If your remaining balance exceeds 5 days, please ensure you obtain approval from your Assistant Director to carry over the additional hours. Once approved, forward the confirmation to trent.support@rbwm.gov.uk so we can process the request.

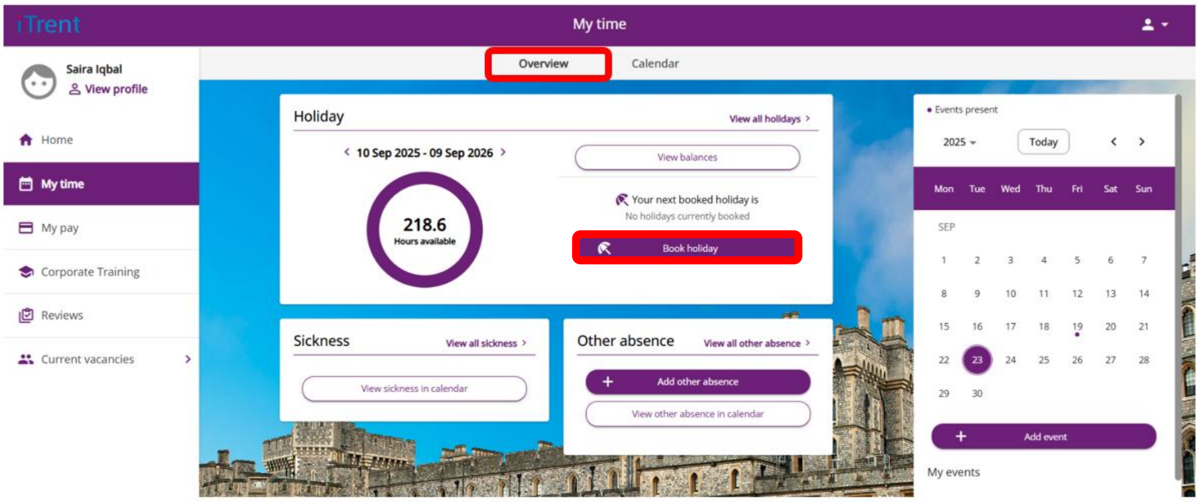
How to convert your hours to days by using the formula:

Hours available ÷ hours worked per day = Days.

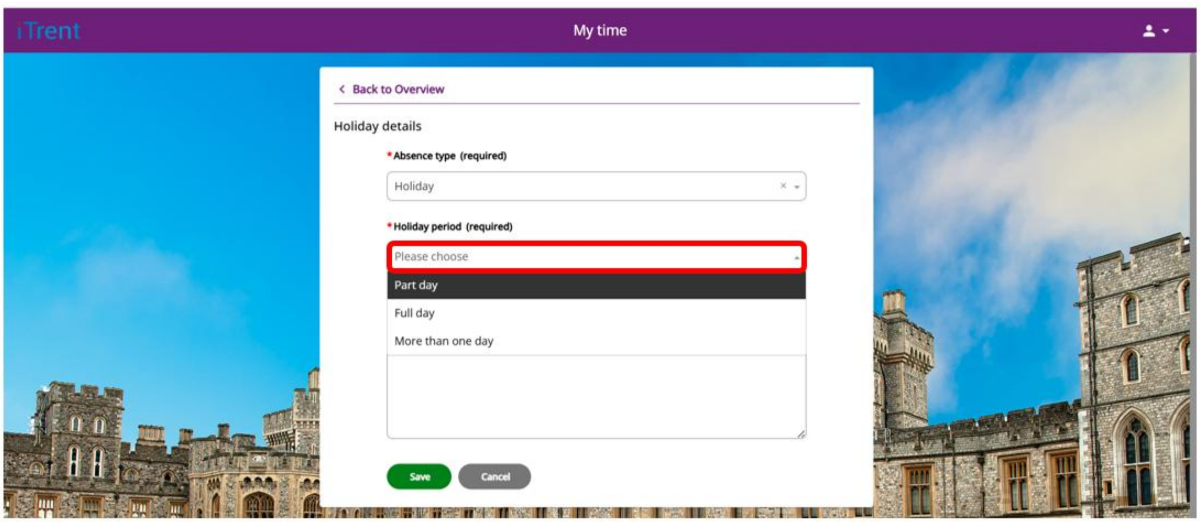
Example= 218.6 hours ÷ 7.4 = 29.5 days

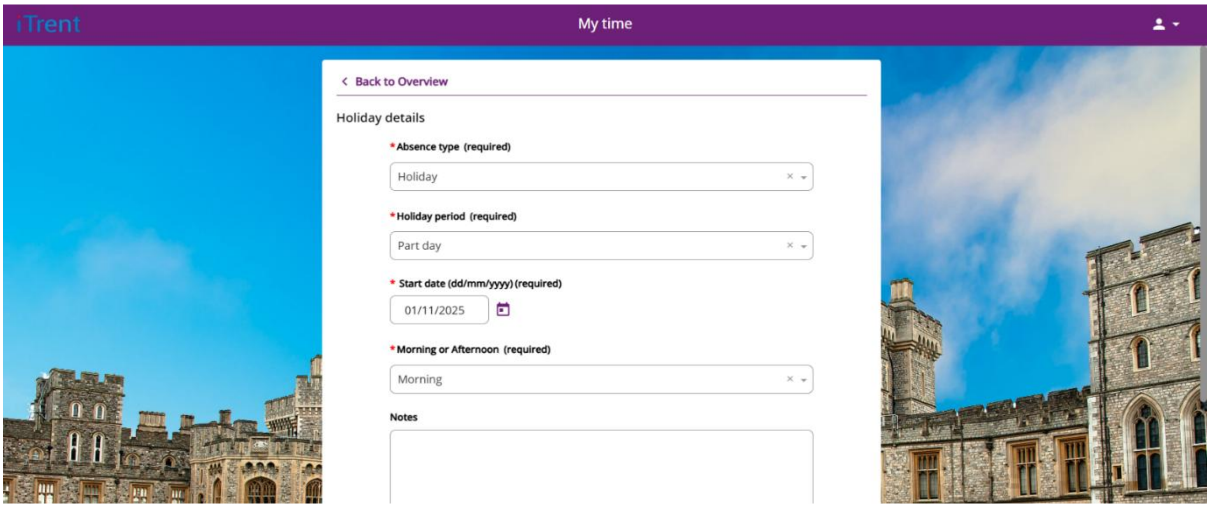
4.1. Booking annual leave

To book annual leave, you need to select ‘My time’. The screenshot below is displaying an ‘Overview’ of your absence details. You will need to select ‘Book holiday’.

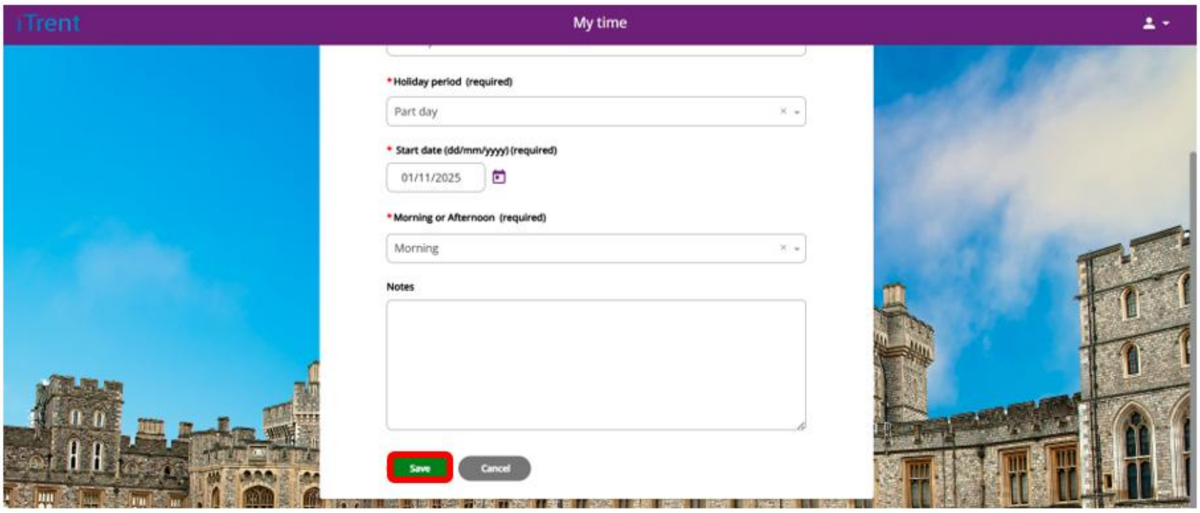


You will then be required to select from the relevant option from the drop-down menu and complete the fields marked with an asterisk (*).

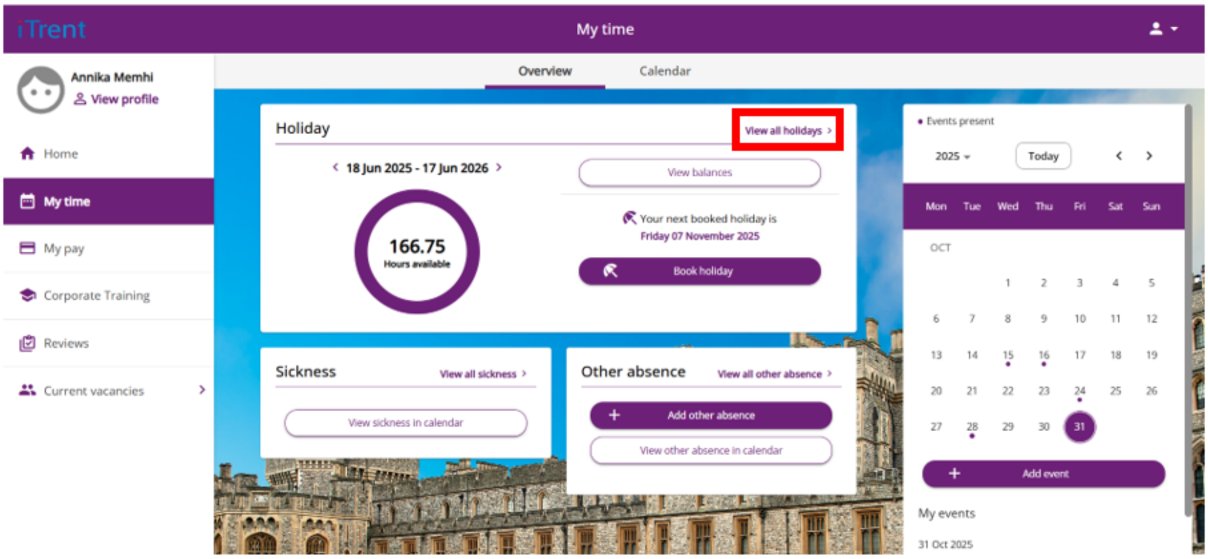




Once you have completed the fields, you will be required to select 'Save.

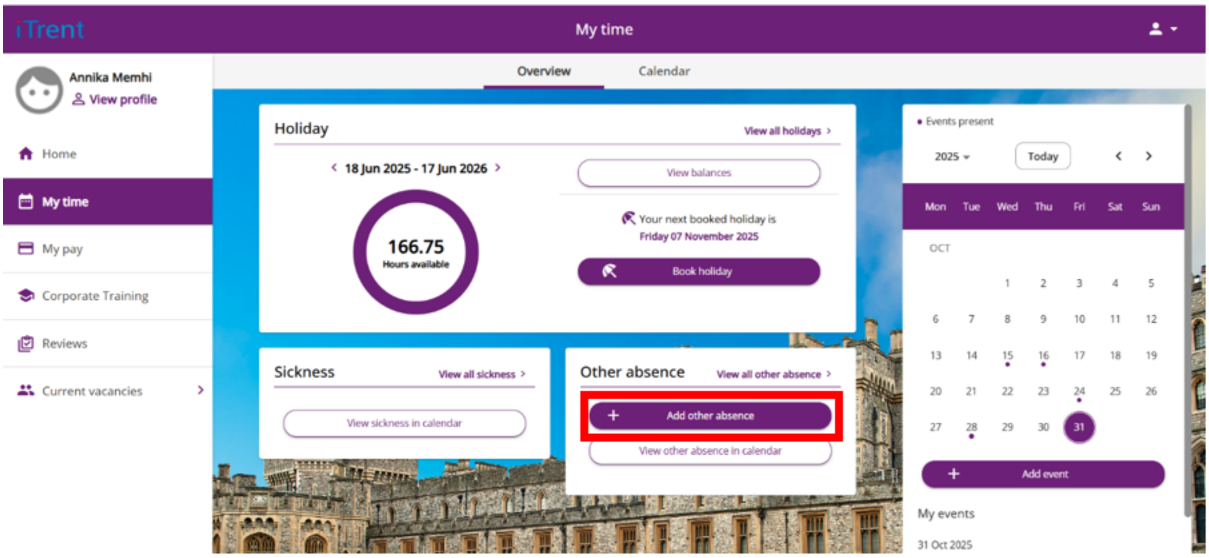


To review your annual leave history, select 'View All Holidays'.

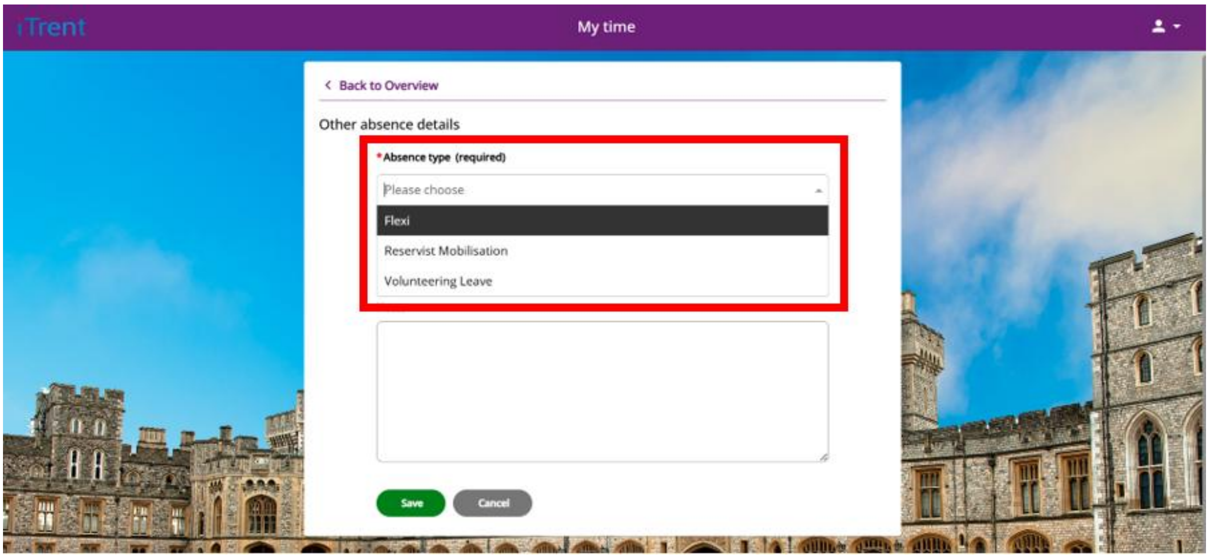


4.2. Booking other absences

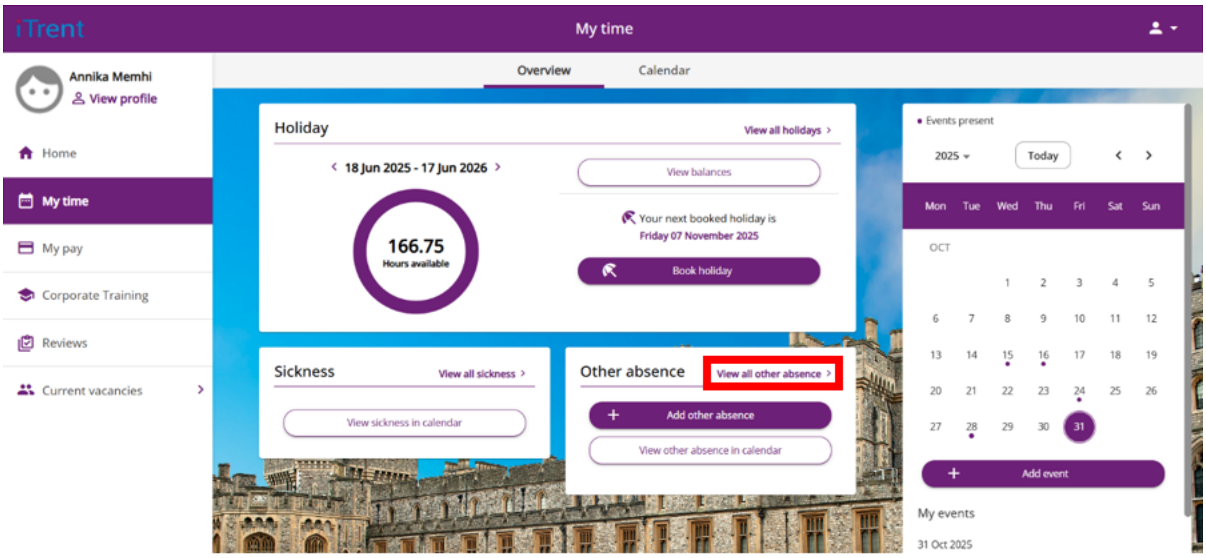
The method to book other absences is similar to how you book holidays. Click '+ Add other absence.



Use 'Other Absences' to request time off for reasons not covered by annual leave. Refer to the attached examples for guidance.

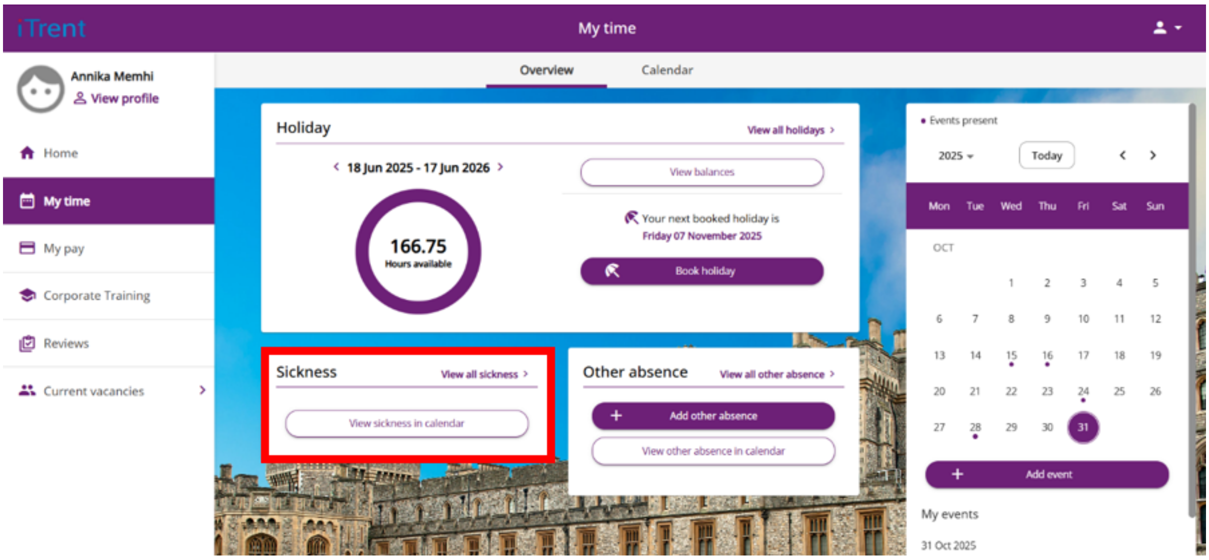


To review your other absence history, click 'view all other absences'.



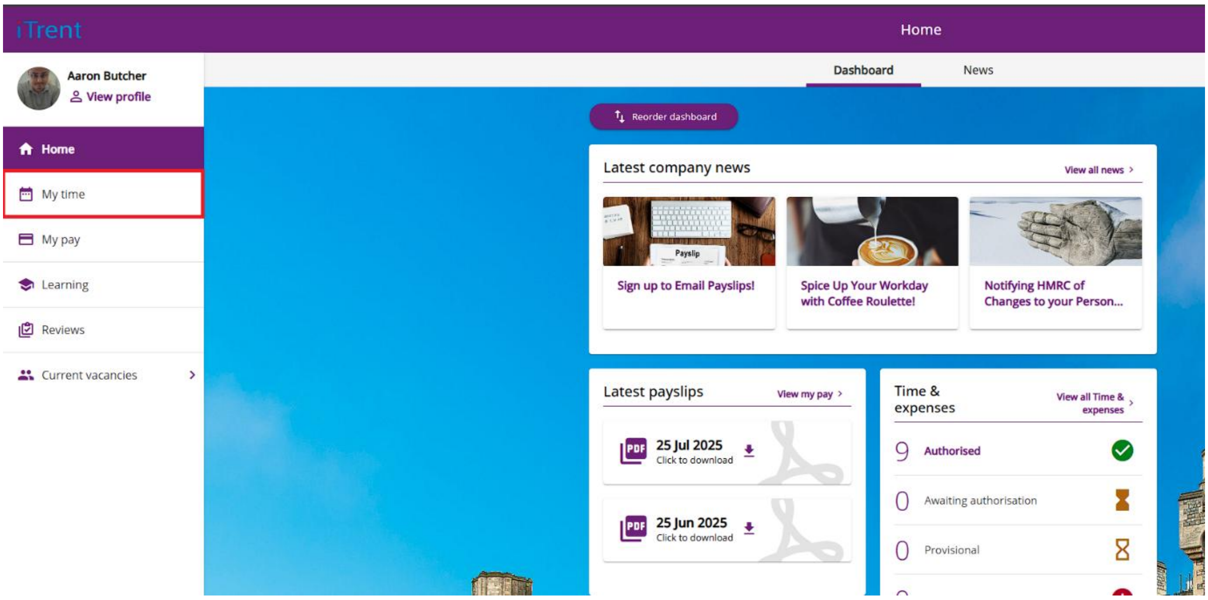
4.3. How to view sickness

To view your sickness history, click ‘View All Sickness’. Please note that entries are uploaded by your line manager, and you will have view-only access to the details.

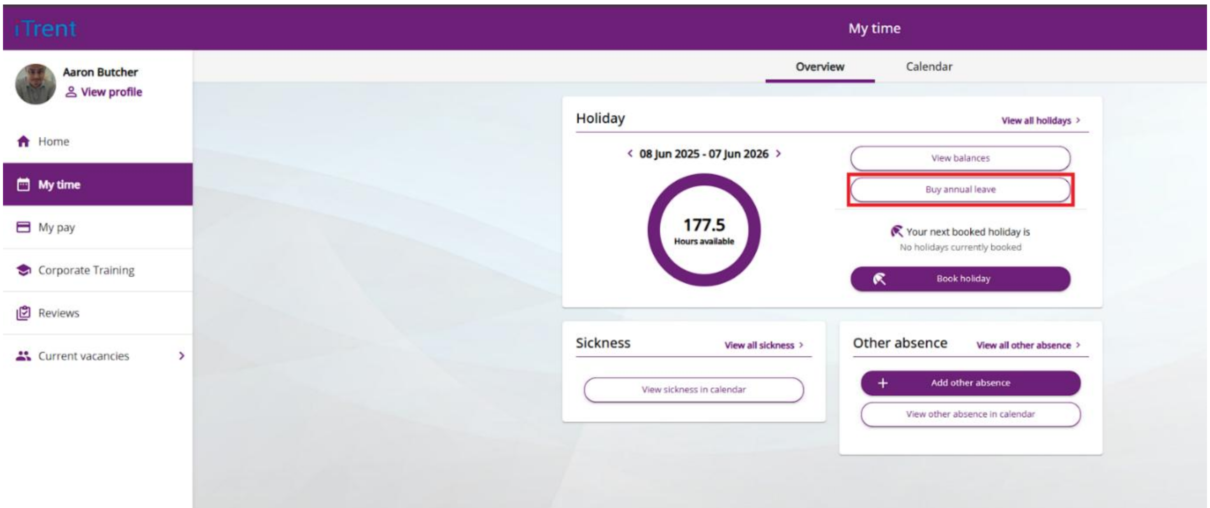


4.4. how to buy annual leave

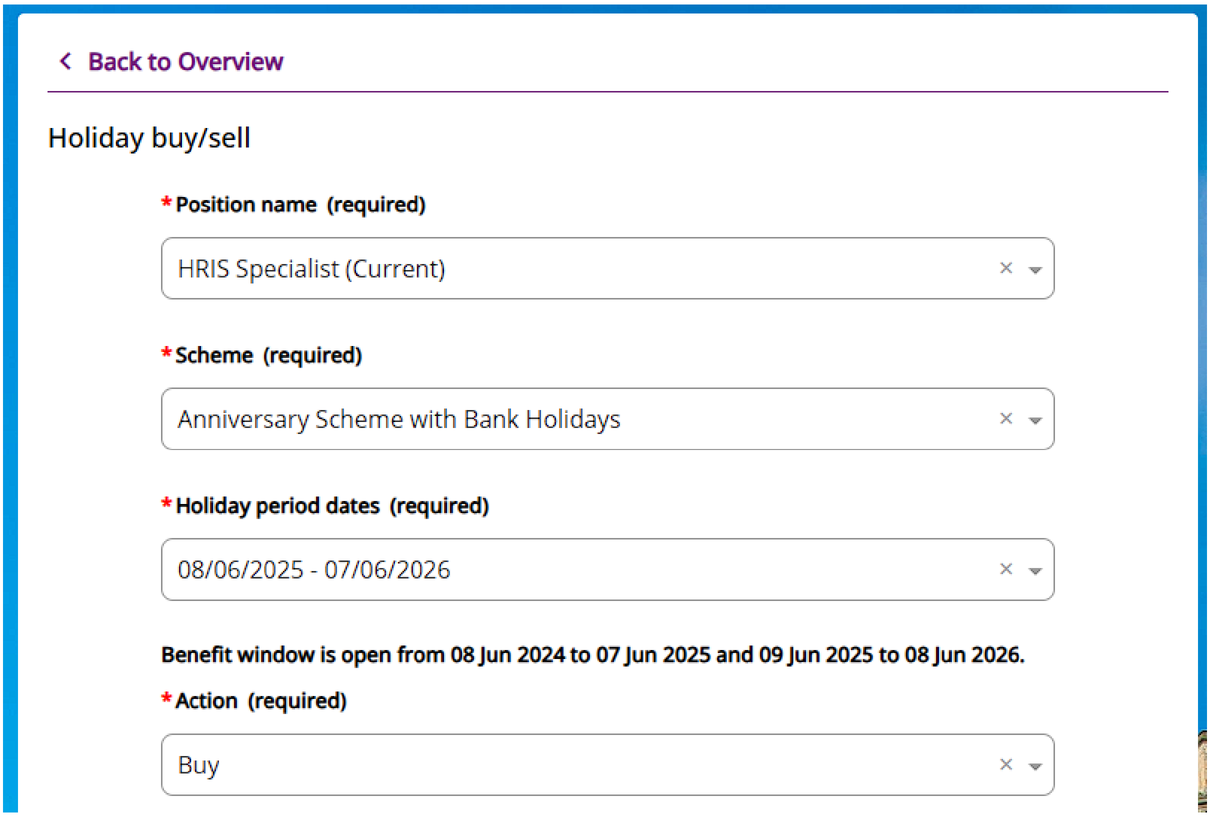
Click onto the ‘my time’ section



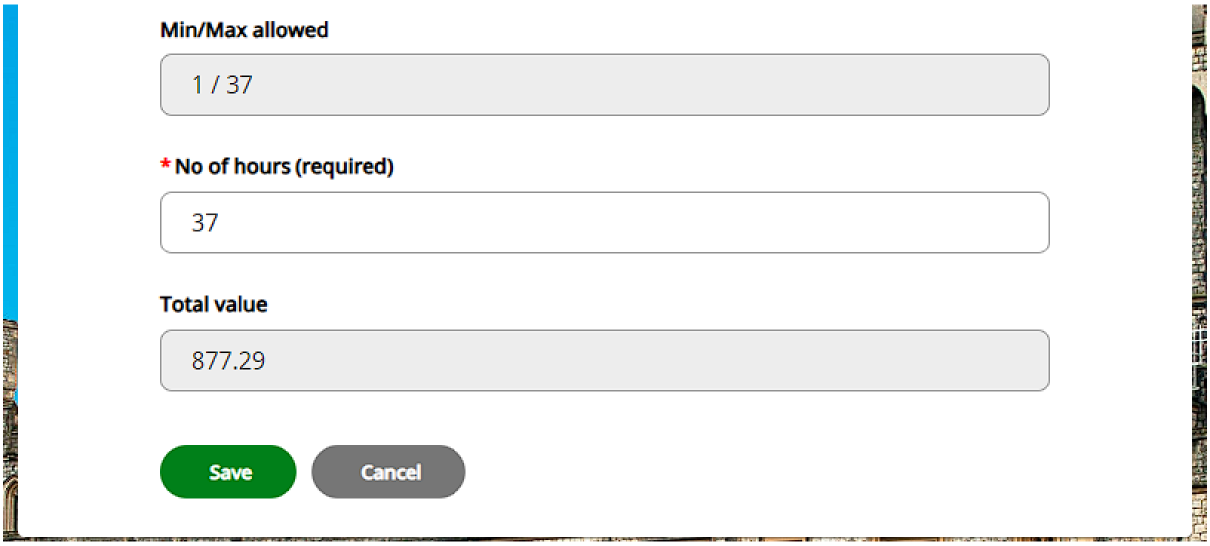
Click onto ‘buy annual leave’



Select your current position, scheme and the holiday year that you would like to purchase leave for. Then select ‘Buy’.



Input the number of hours you would like to purchase in the ‘No of hours’ field. Click the Tab key on your keyboard or click anywhere else on the screen and the system will calculate the annual cost of the hours you would like to purchase.

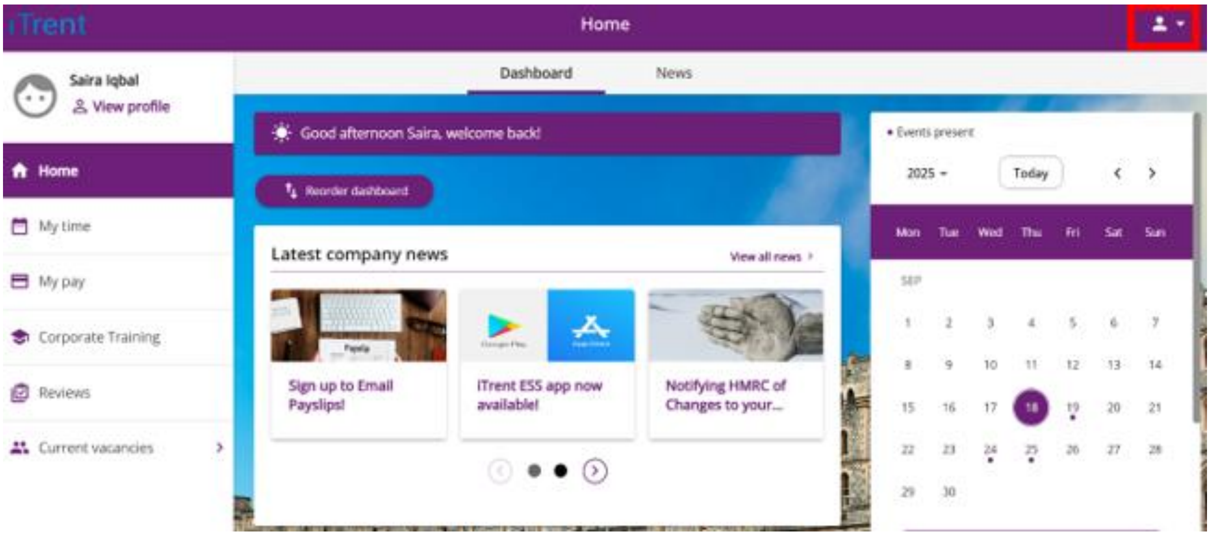


Click on ‘Save’ to submit your request to your line manager for approval.

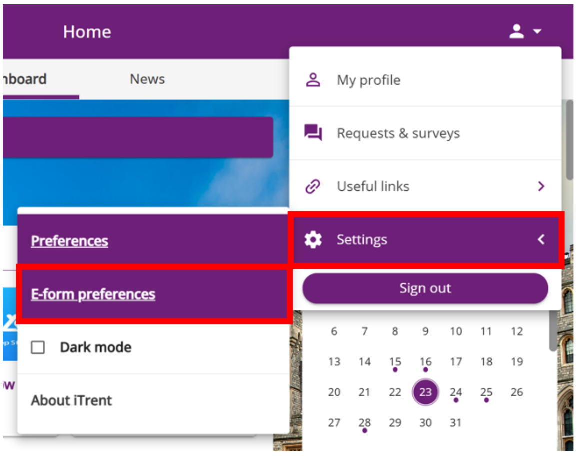
5. My Pay

5.1. Signing up for email payslips & P60s

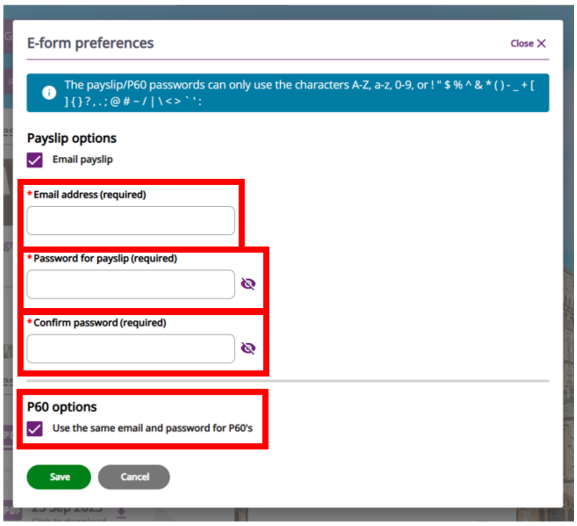
Click the person icon in the top-right corner of the page.



Select the ‘Settings’ button and then click ‘E-form preferences.

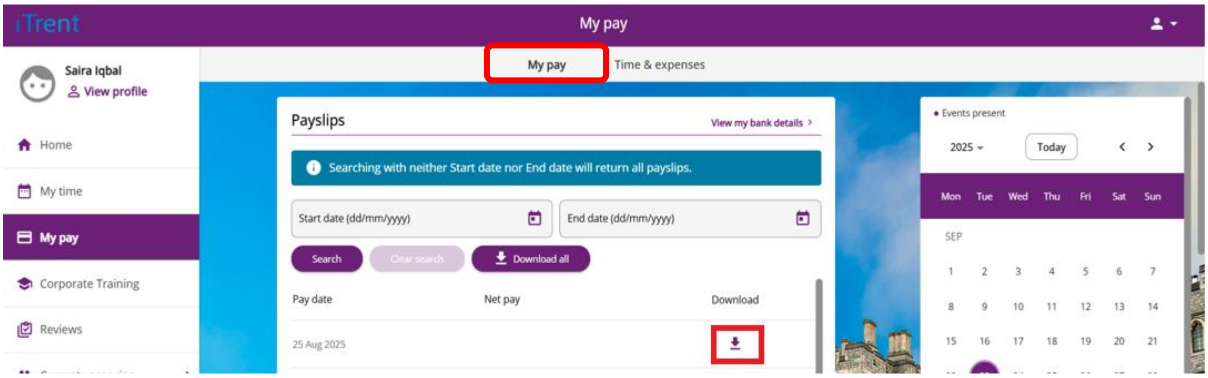


Fill out your email address that you want the payslips and P60 to be sent to and a secure and memorable password. To keep your payslips and P60 documents secure, they'll be sent as password-protected PDFs. Once this information has been filled out, click save.



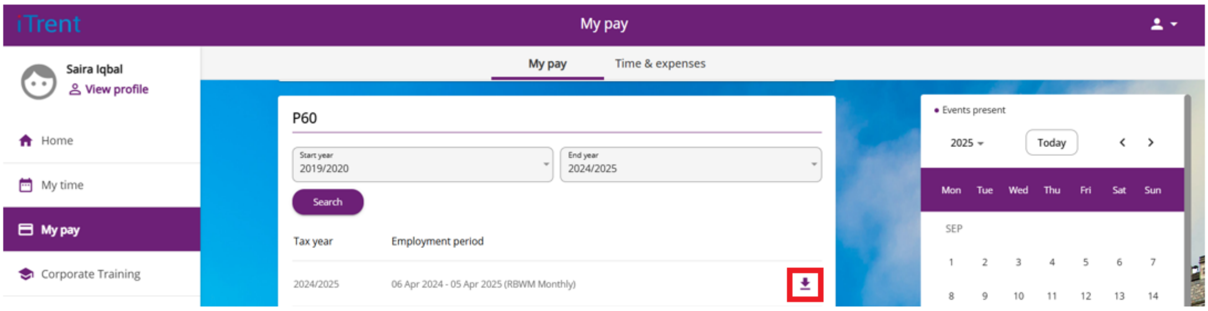
5.2. Viewing and downloading payslips

To view your payslips, navigate to the ‘My Pay’ section. To download a payslip, click the downward-facing arrow. Once downloaded, the payslip will be saved to your browser’s Downloads folder, where you can easily view, print, or share it as needed.



5.3. Viewing and downloading P60

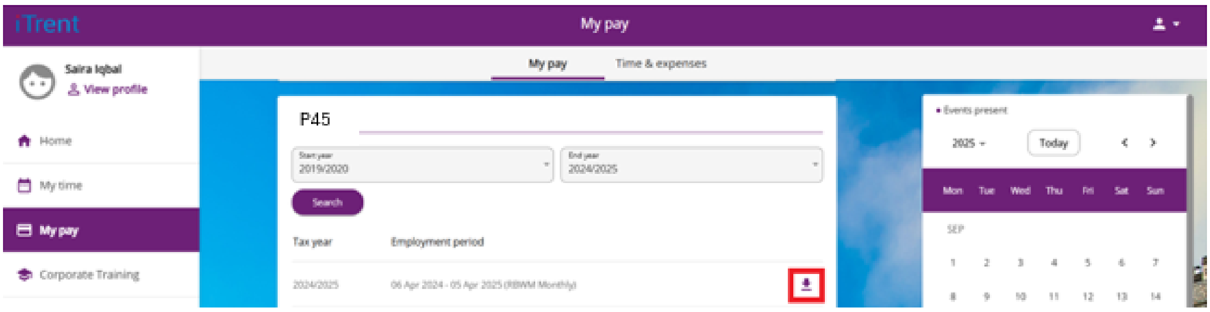
To view your P60, go to the ‘My Pay’ section and scroll down past your payslips. To download a P60, click the downward-facing arrow. Once downloaded, the P60 will be saved to your browser’s Downloads folder, where you can easily view, print, or share it as needed.



5.4. Viewing and downloading P45 (Leavers Only)

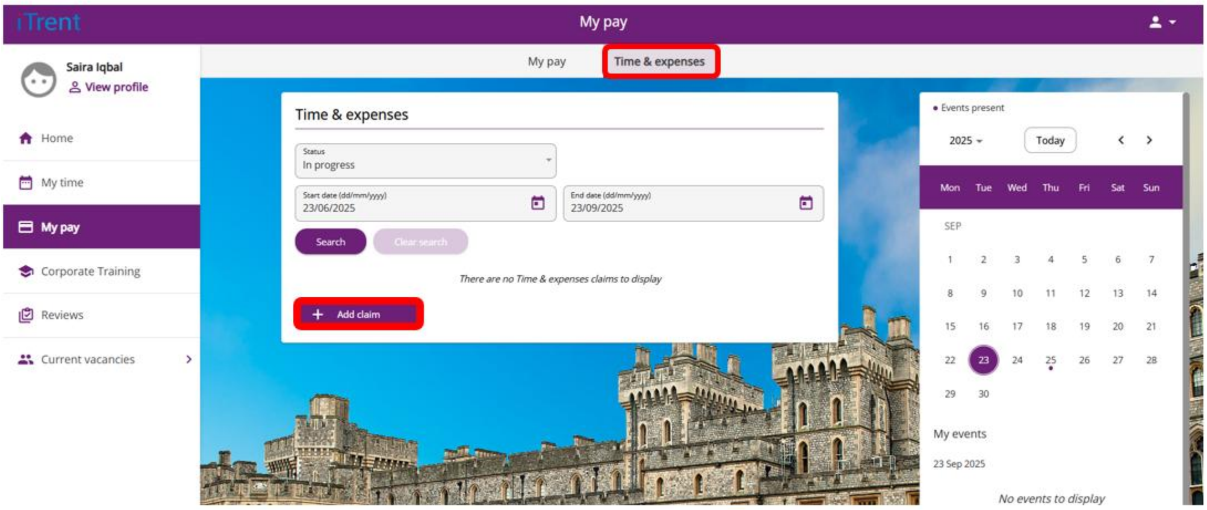
Your P45 will be issued after your employment ends. To access it, navigate to the ‘My Pay’ section and scroll below your payslips and P60. Click the downward-facing arrow to download your P45. Once downloaded, the document will be saved to your browser’s Downloads folder, where you can easily view, print, or share it.

Please note: If you have opted into receiving your payslips/P60s via email, a copy of your P45 will be sent to you via email at the end of your final pay period.

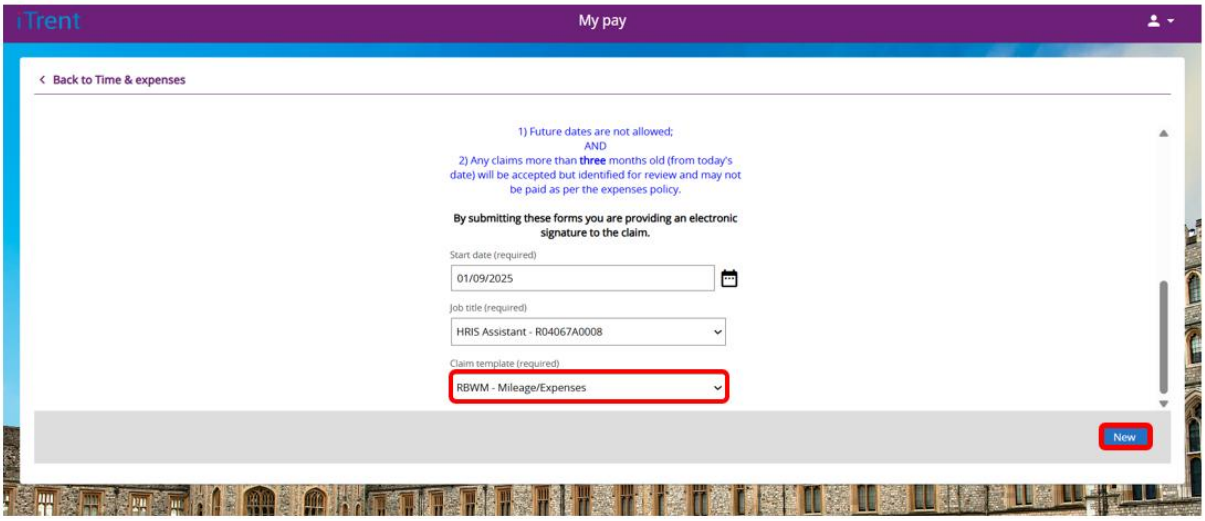


5.5. Submit Time & Expense claims

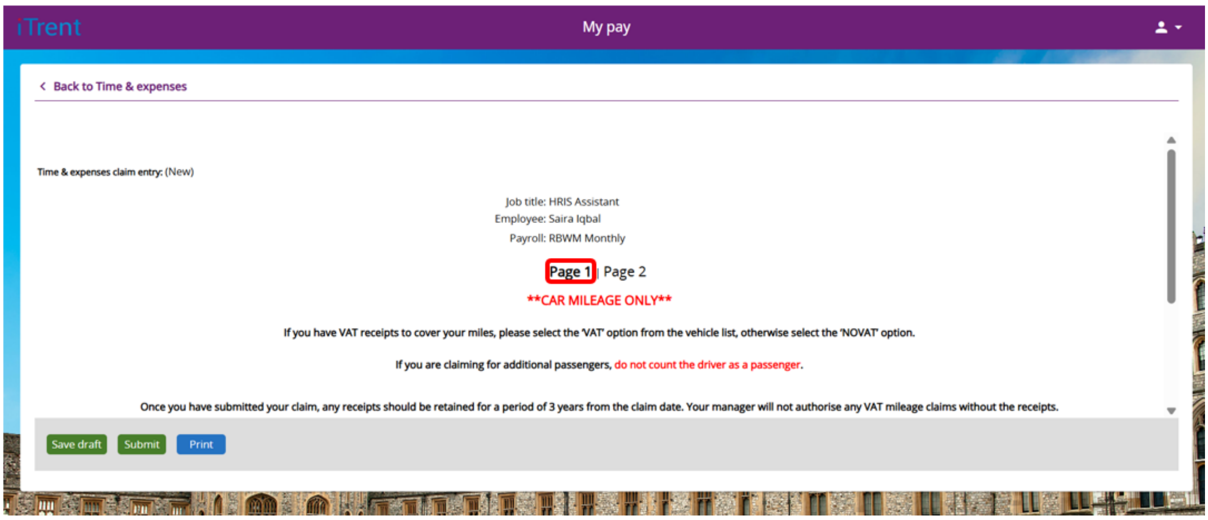
To add a new claim, select ‘Time & expenses’ and then click ‘+ Add claim’



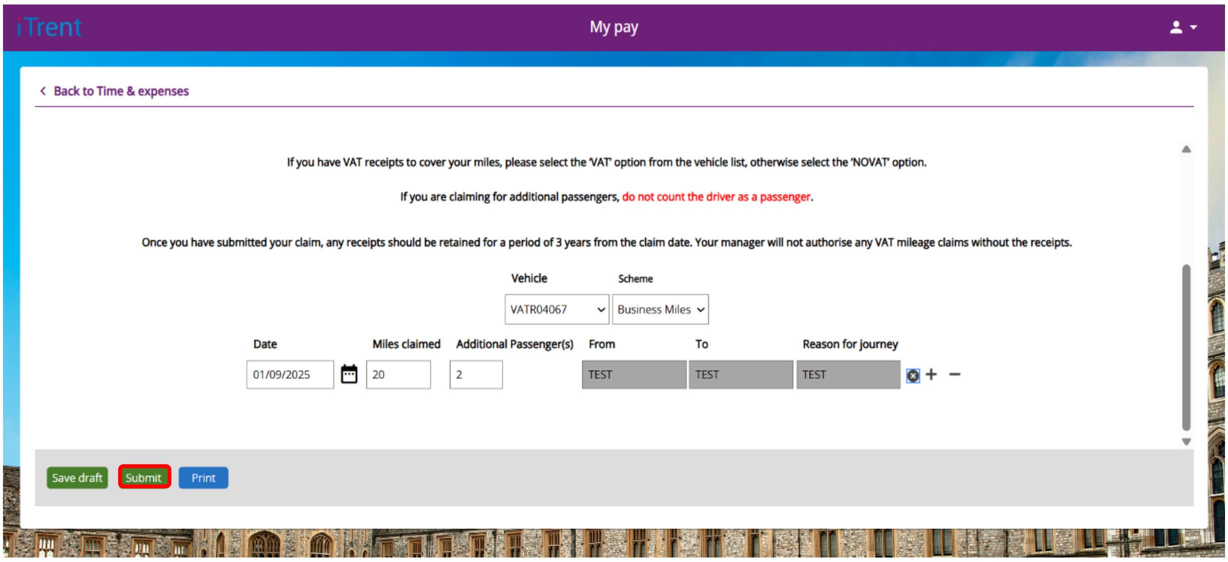
From the drop down select the relevant claim template. Once you have chosen the correct template, you then need to select ‘New’.



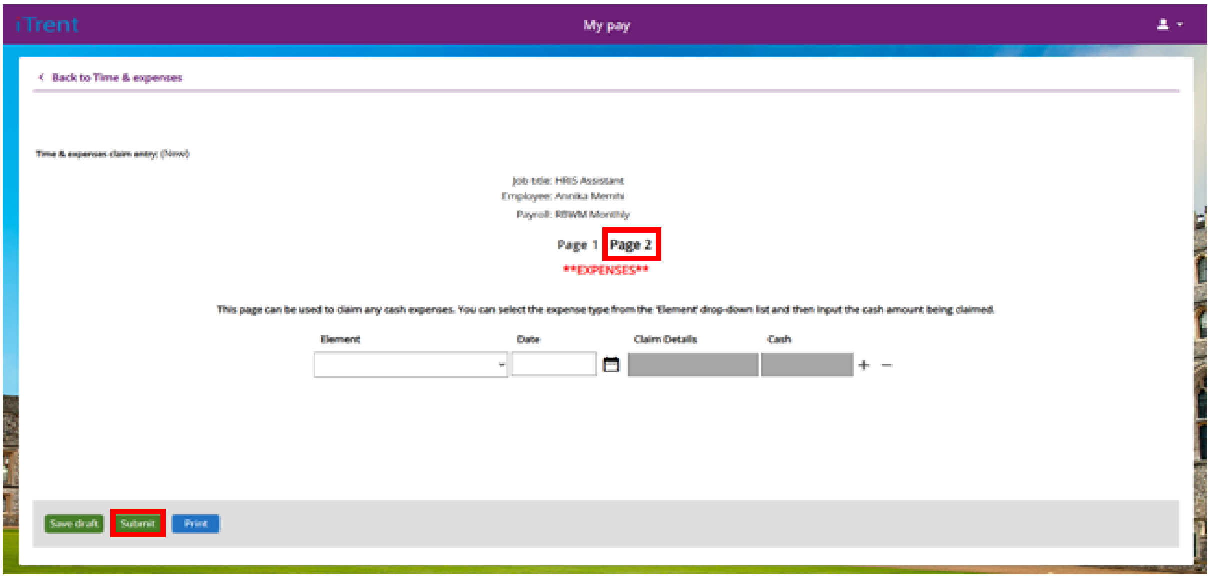
For ‘mileage claims’, you *must* select ‘Page 1’.



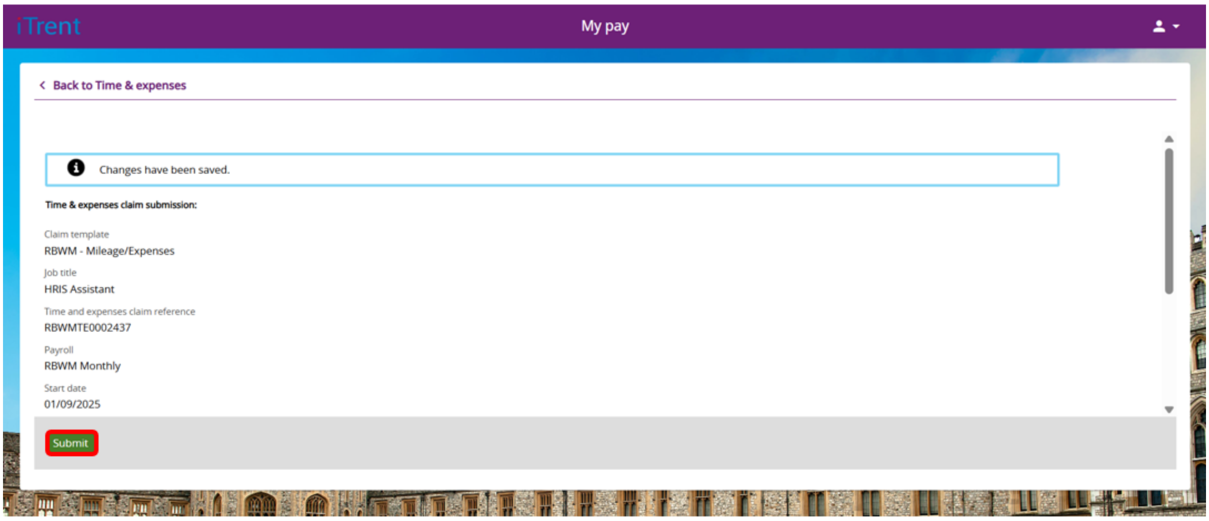
You will then be required to input the fields as displayed in the screenshot below and select 'Submit'. Please note that it is crucial that you 'Submit' the claim and not click 'Save draft' as it will be sat as a provisional claim and your manager will not be notified, in turn it will not be authorised.



For 'expense claims', you *must* select 'Page 2'.

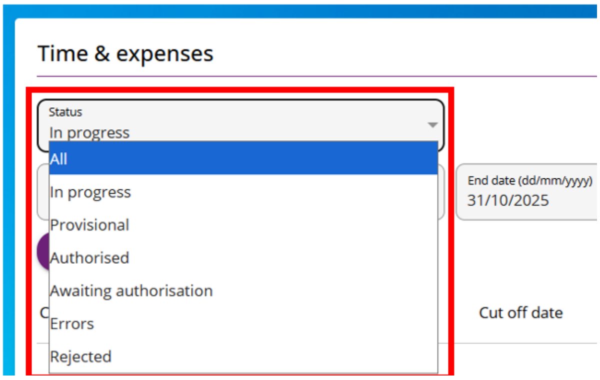


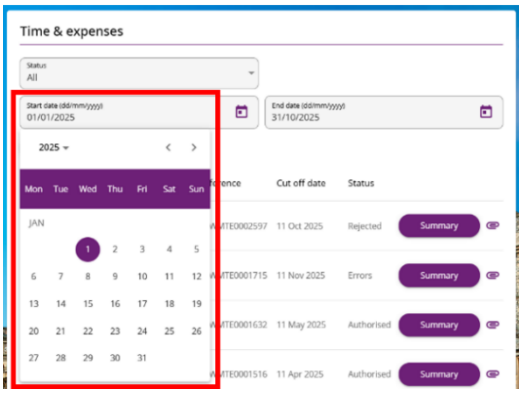
You will then be required to input the fields as displayed in the screenshot below and select ‘Submit’. Please note that it is crucial that you ‘Submit’ the claim and not click ‘Save draft’ as it will be sat as a provisional claim and your manager will not be notified, in turn it will not be authorised.



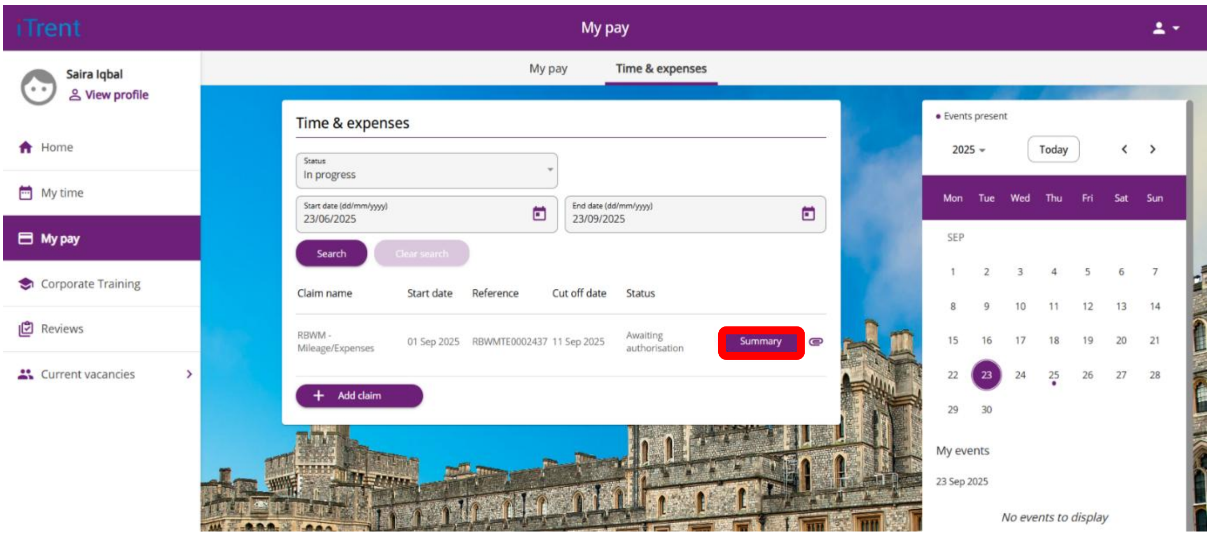
5.6. Viewing previous expense claims

To see all claims that you have previously submitted, whether they have been authorised, in progress or rejected, use the status dropdown to select your preferred filter. Then, choose a start date to see the time period you’d like to review.





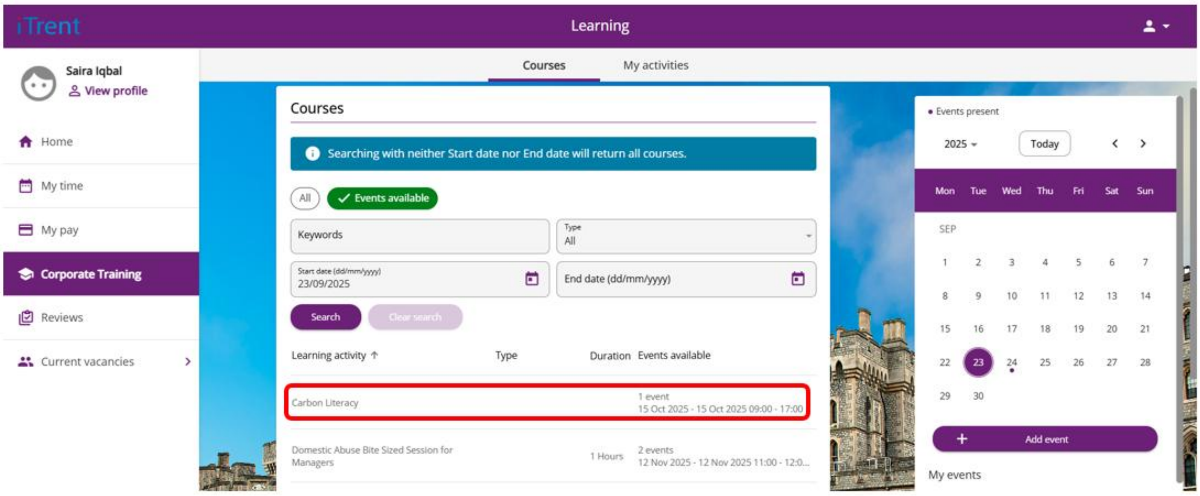
A list of claims will appear and to view a claim, select ‘Summary’.



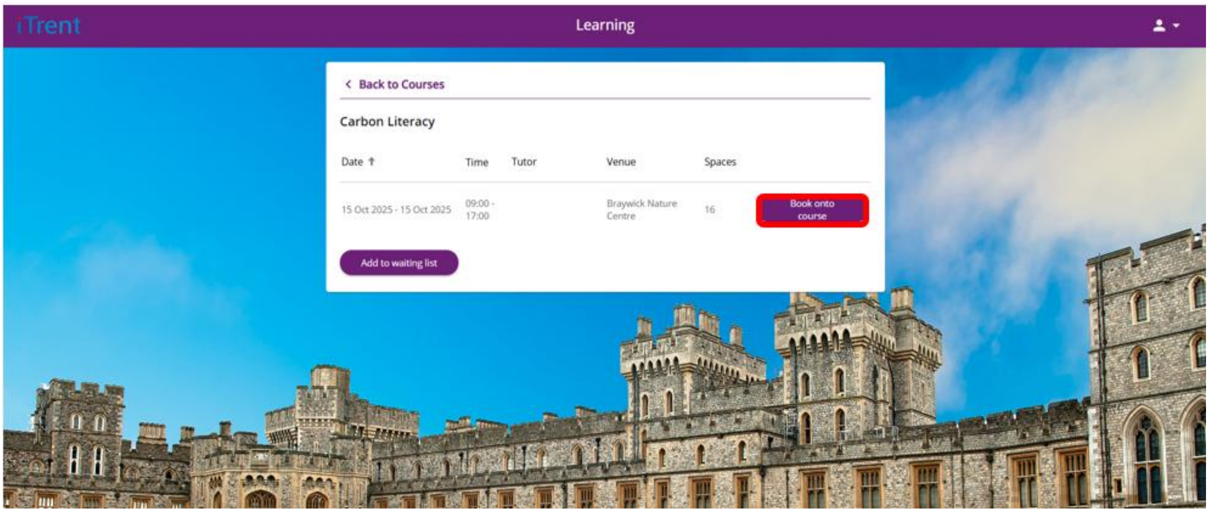
6. Corporate Training

6.1. Booking a course

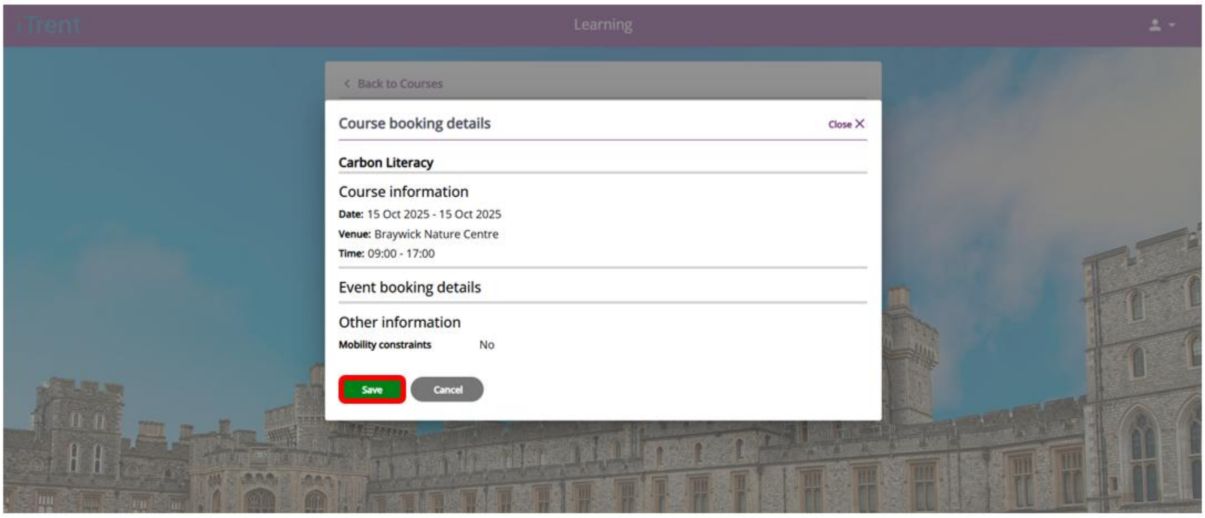
To book a course, select ‘Corporate Training’. You’ll then see a list of available course options. Once you’ve found the course you’d like to attend, simply click on it to proceed with your booking.



Once you’ve selected your preferred course, click ‘Book onto course’ to complete your registration.

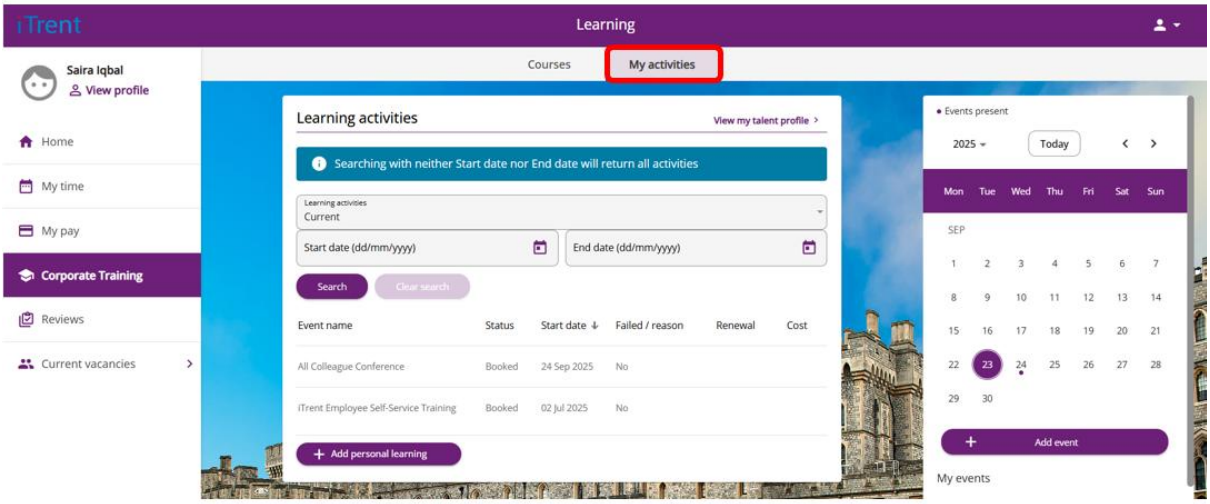


Ensure you click 'Save' to confirm the booking.



6.2. Viewing your courses

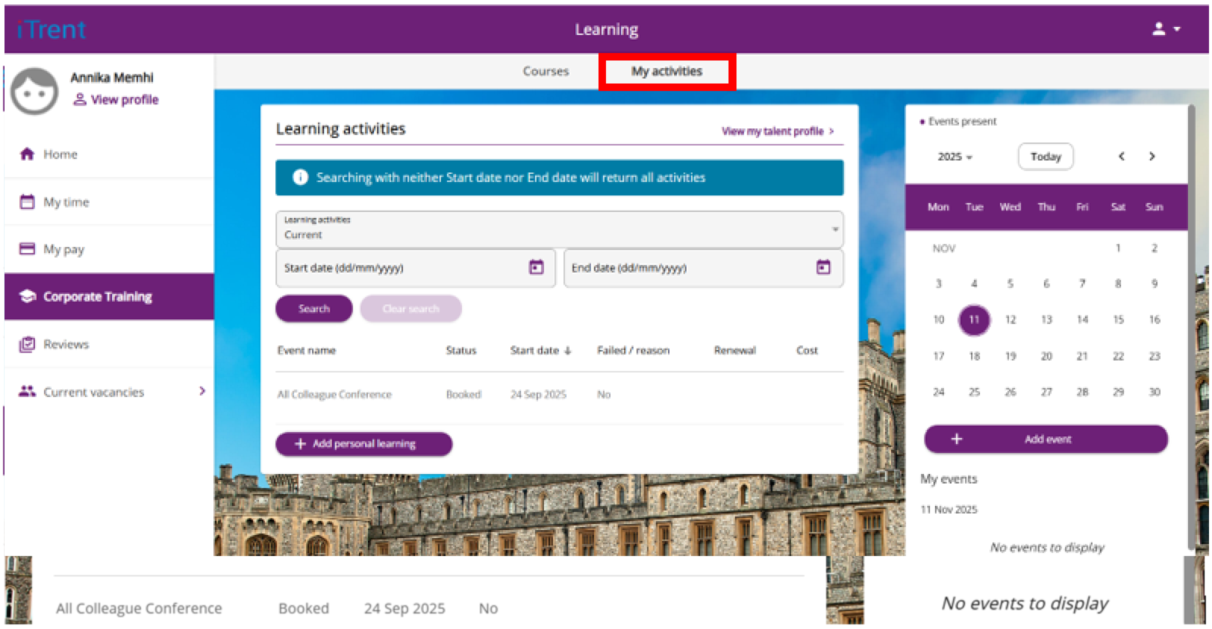
To view what courses you are currently booked on to, select 'My activities'.



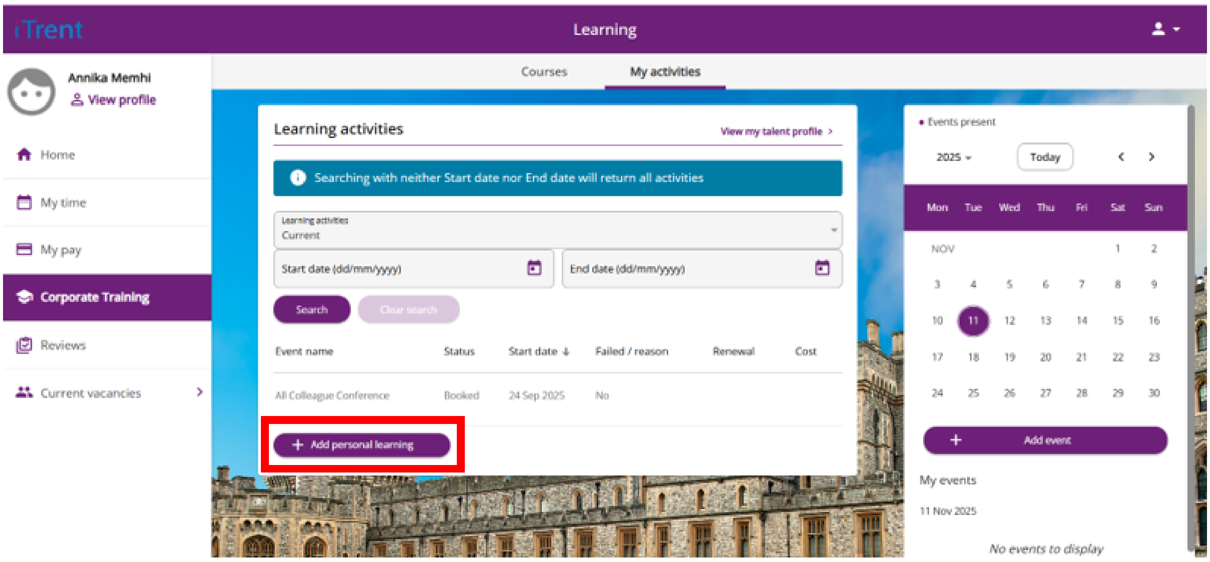
To view your past and current courses, click on the 'Learning Activities' dropdown. This will display all courses you've booked, regardless of their status. Whether they're completed, cancelled, in progress, or waiting authorisation. Then click 'Search' below this for the results to appear.

6.3. How To Upload a Certificate

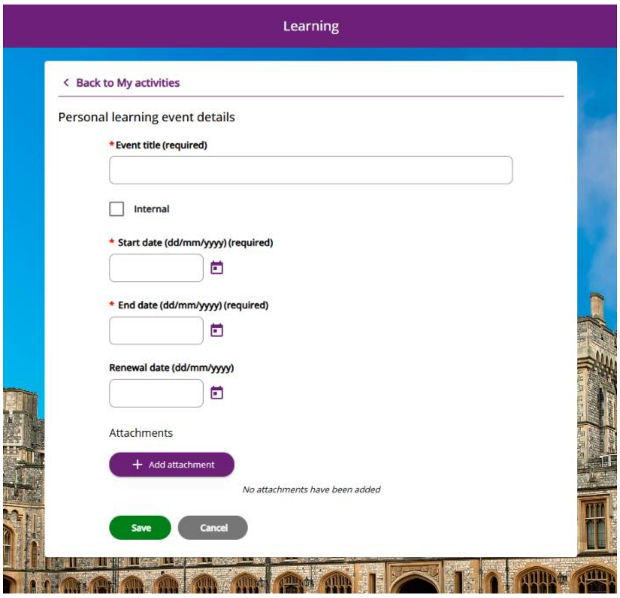
Navigate to the Corporate Training section and click 'My activites'



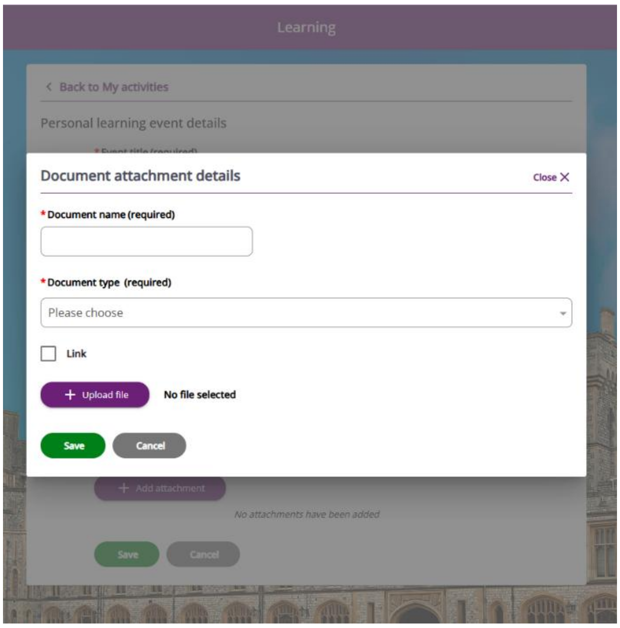
Click '+ Personal learning'



Fill out the relevant fields marked with an asterisk



To attach the certificate click '+ Add attachment' and name the document and click 'upload file'. Your browser will open up and select the document from where you saved it.

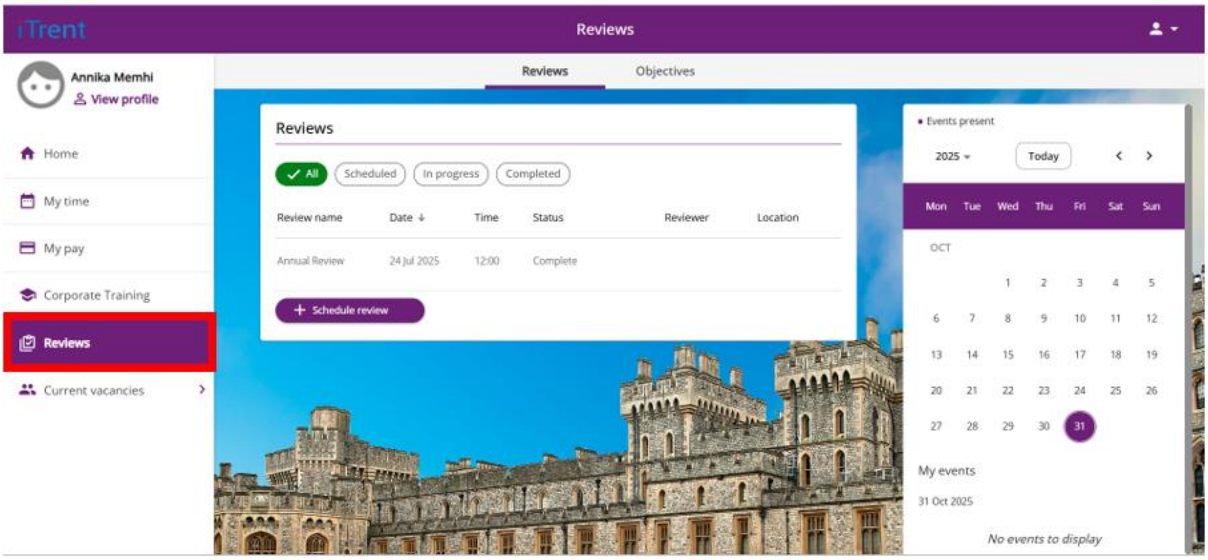

Learning
Back to My activities
Personal learning event details
Document attachment details
Close
* Document name (required)
* Document type (required)
Please choose
Link
Upload file
No file selected
Save
Cancel
Add attachment
No attachments have been added
Save
Cancel

7. Reviews and Objectives

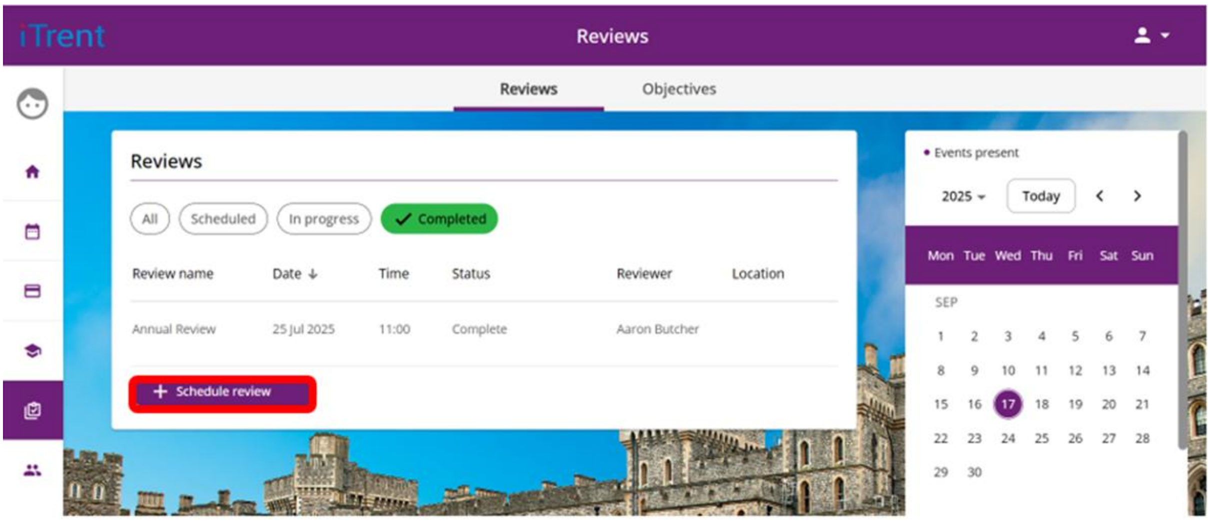
iTrent reviews video guide: [iTrent Reviews Demo (youtube.com)]

7.1. Booking and completing review

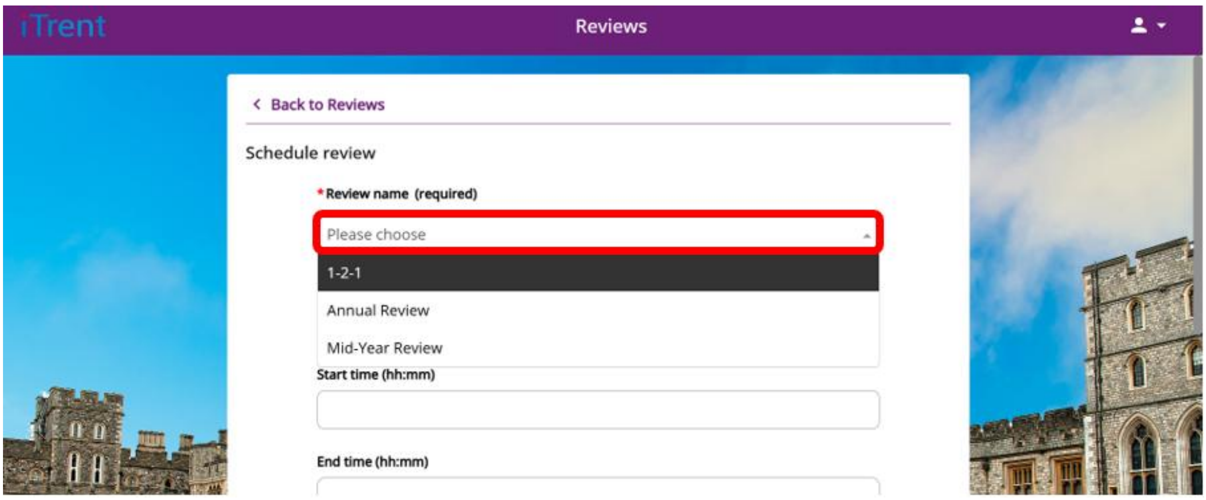
To schedule a review, click the ‘Reviews’ icon.



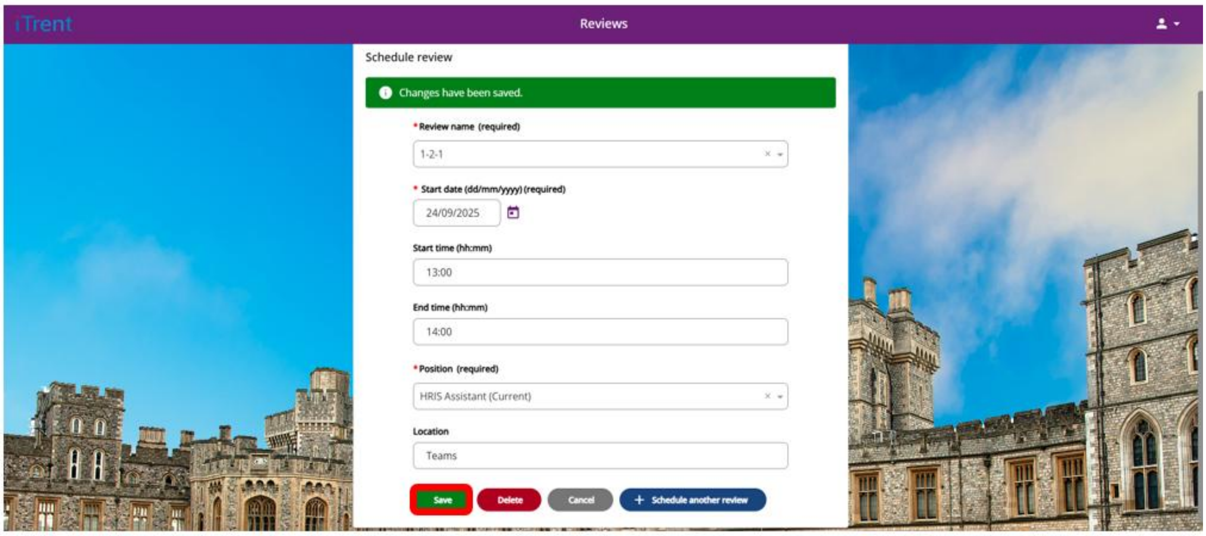
Select ‘+ Schedule review’.



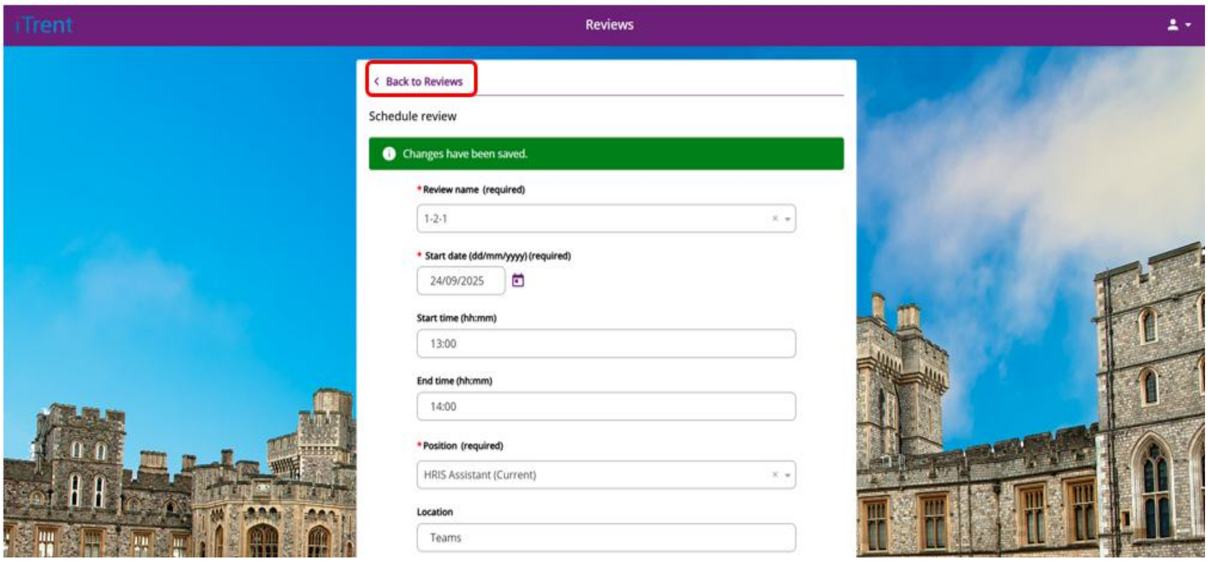
From the ‘Review name’ dropdown menu, select from one of the available options.



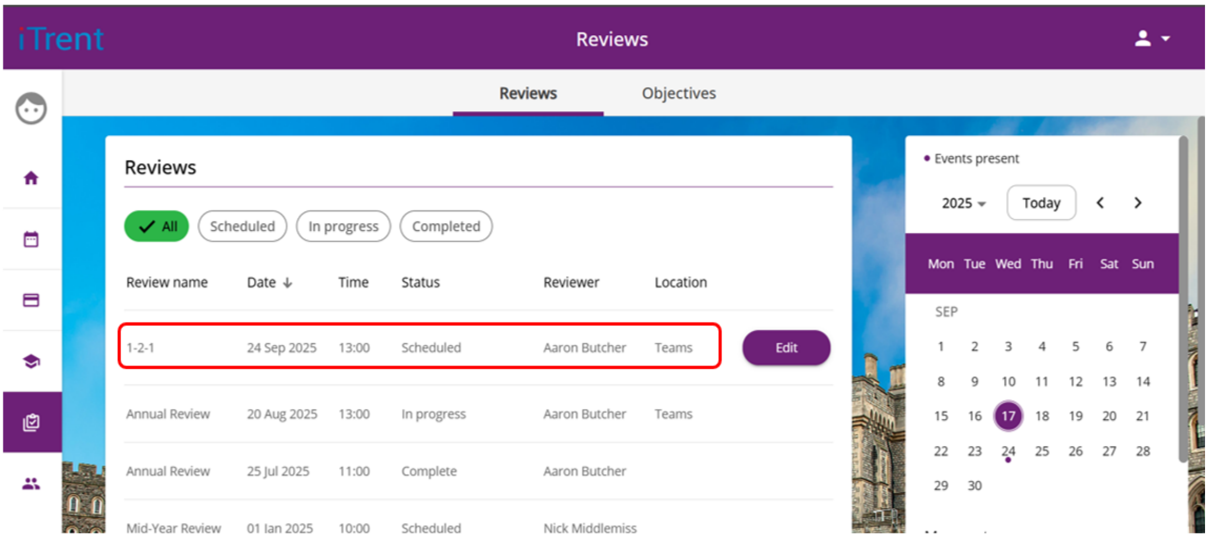
After selecting the relevant review, fill in all the mandatory fields (those marked with an asterisk). When choosing your position, ensure you select the one marked *Current*. This is important if you have multiple positions, as it allows your manager to view the correct one in People Manager access. Select 'Save'.



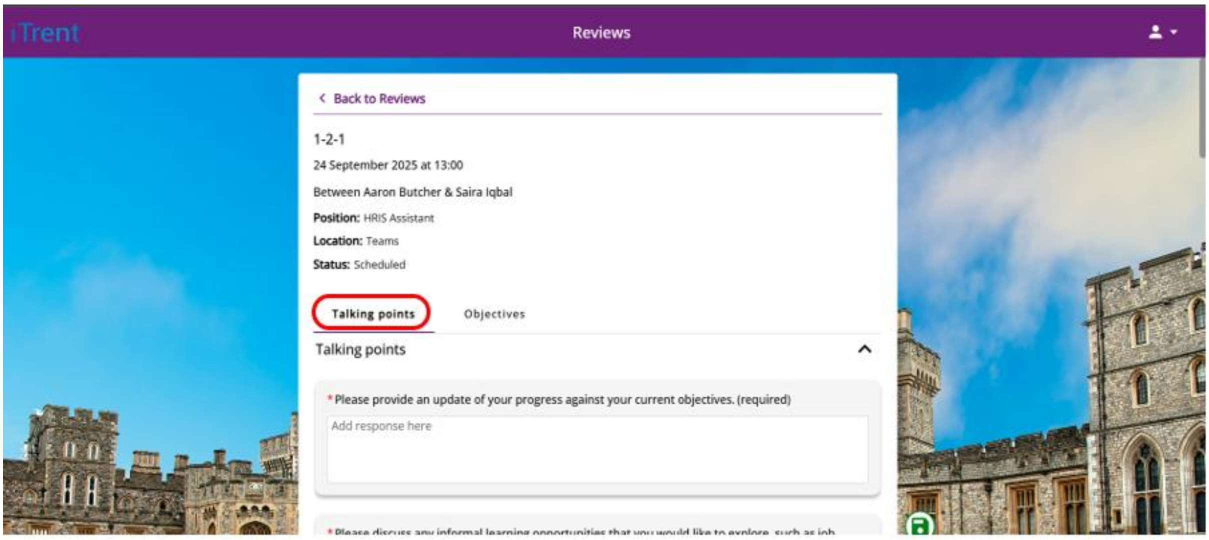
Select 'Back to Reviews' to view the review you have just booked.



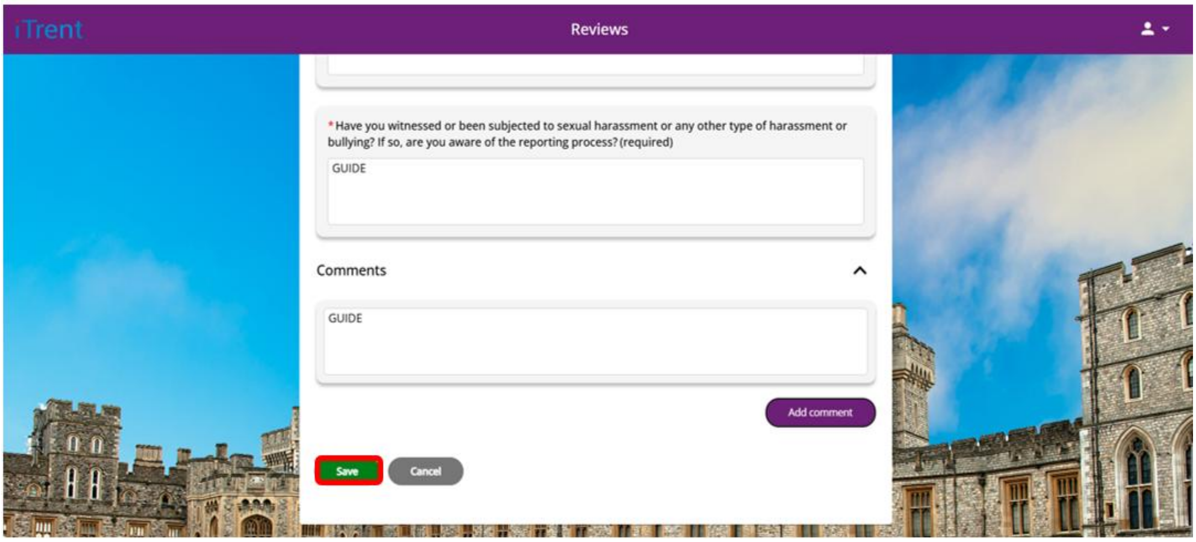
To begin the review process, click on the 1-2-1 review. This will open the self-assessment form for you to complete.



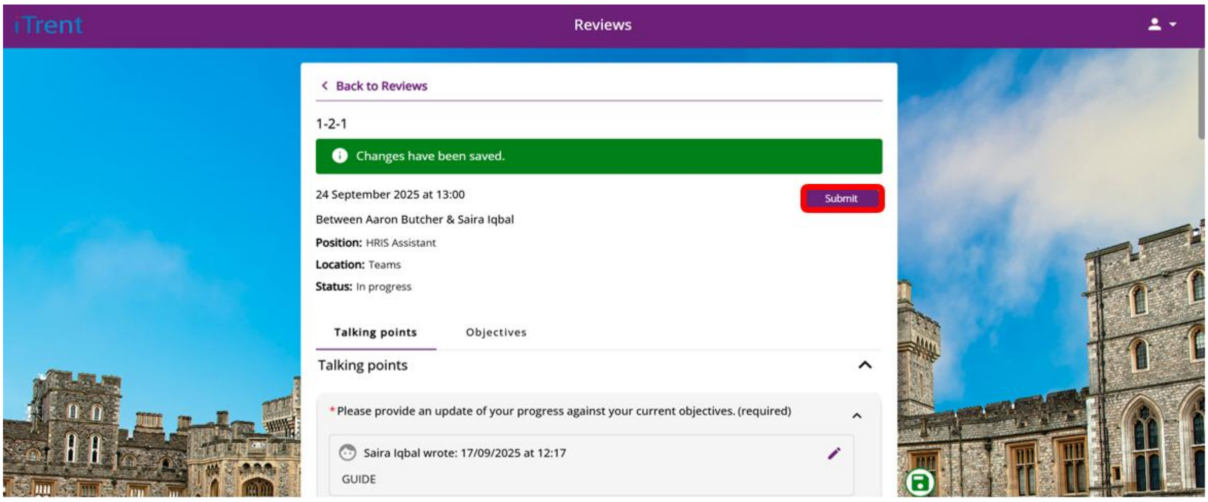
Complete the Talking points by adding the relevant comments in the boxes marked with an asterisk (*), as shown above.

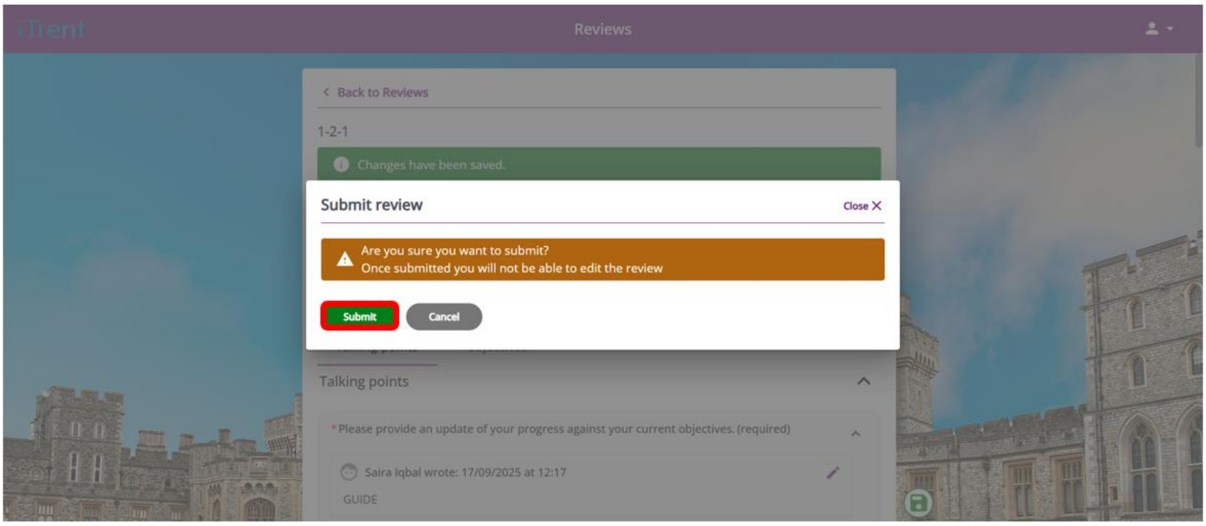


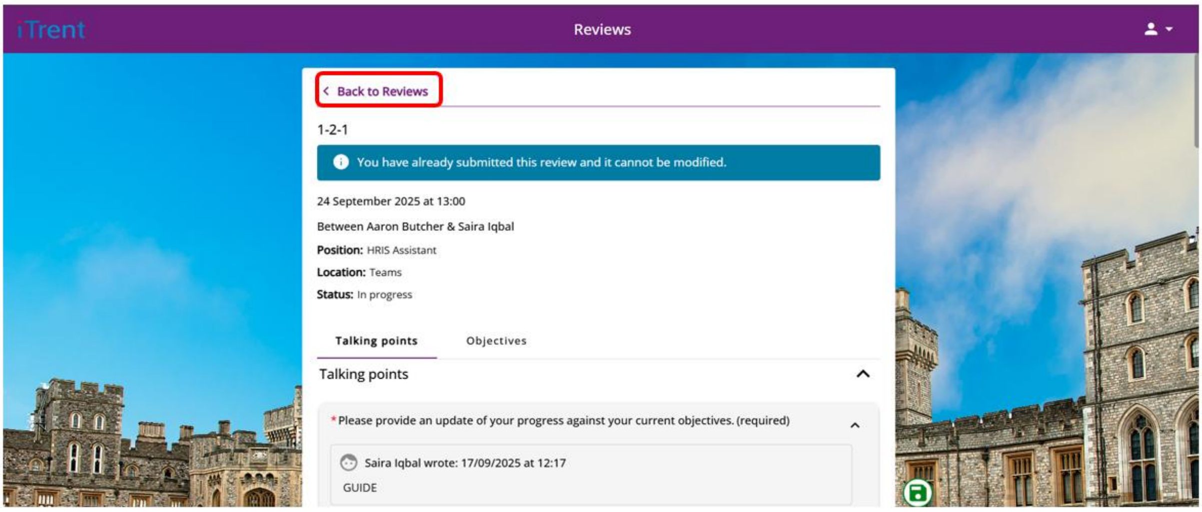
Once you have completed the form, click 'Save'.



You must then click 'Submit'. Your manager will be notified that a review has been scheduled and will be able to view your comments. If you do not click 'Submit', the form will remain in your Employee Self-Service account, and your manager will not be able to access your comments via their People Manager access.



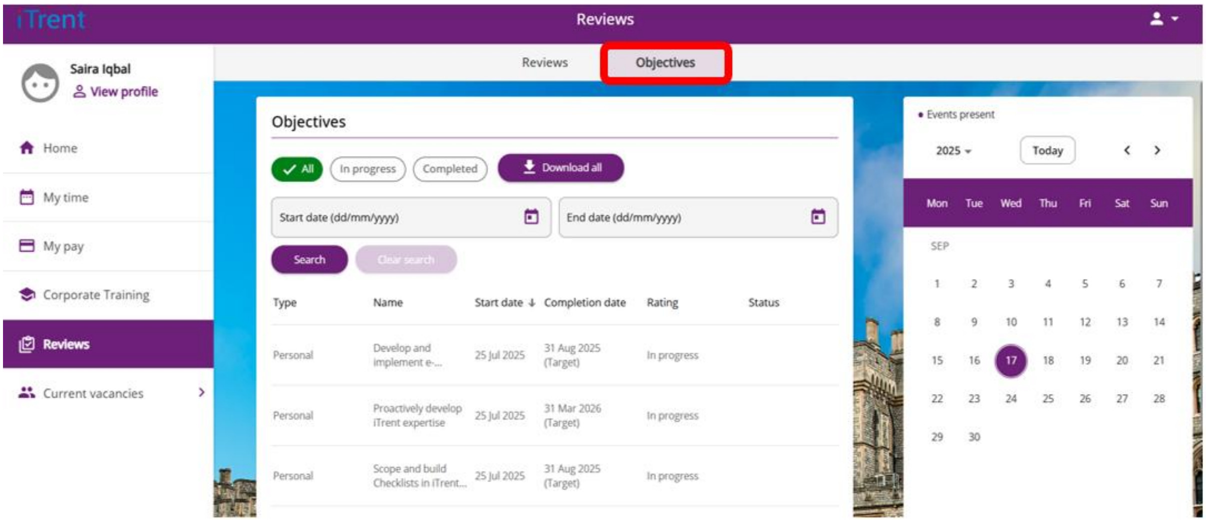




Once you have submitted your review, it cannot be modified. Select Back to Reviews to get to the previous screen. Please note the same method applies when booking in all review types as the one in this guide.

7.2. Viewing objectives

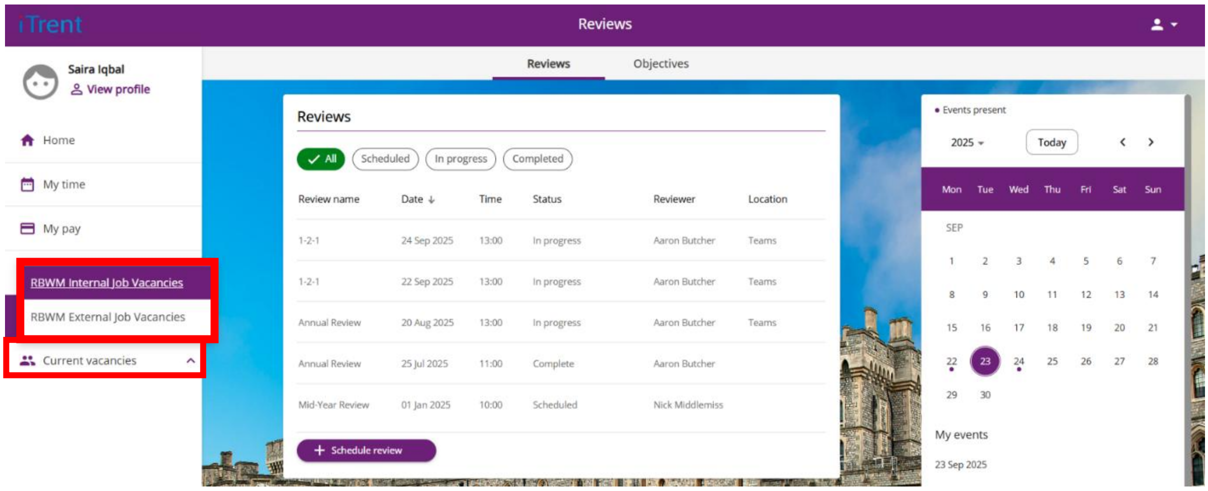
To view your personal objectives, click the ‘Objectives’ tab.



8. Vacancies

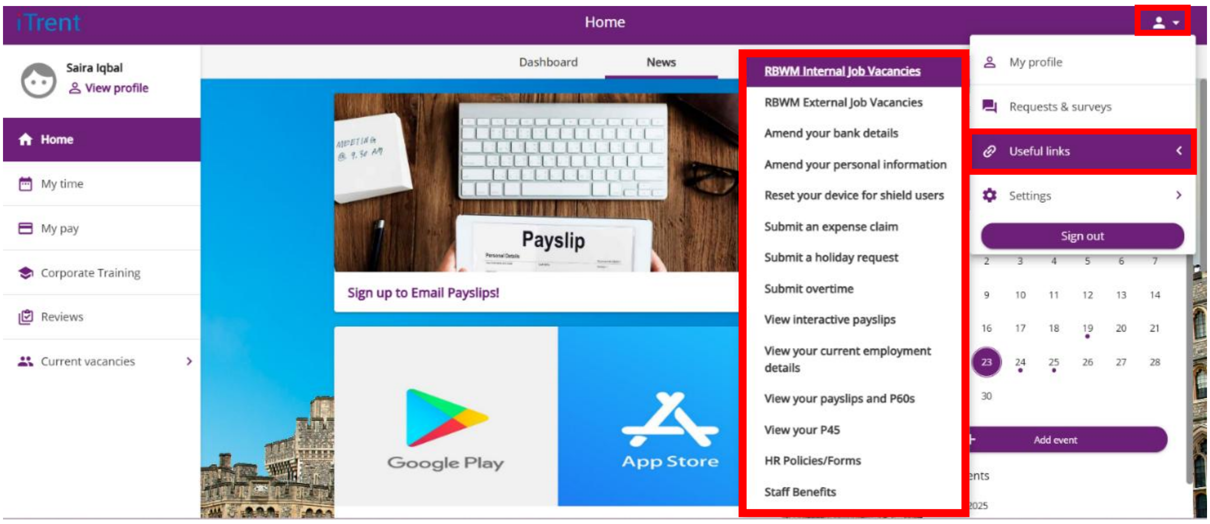
To explore job opportunities, click on the ‘Current Vacancies’ tab. This will open a new window where you can choose between:

RBWM Internal Job Vacancies – Takes you to the internal RBWM jobs page
RBWM External Job Vacancies – Takes you to the external RBWM jobs page



9. Useful Links

Select the person icon in the top-right corner of the page and you will be able to access 'Useful links'. The list contains links to various video guides, which can assist you whilst using Employee Self-Service.



10. FAQs

10.1. Payslips and Pay Information

What is my e-payslips password?

The password for your payslips will be the one you set up on your account via self-service. If you do not remember this, you will need to contact trent.support@rbwm.gov.uk to reset the password for you.

How do I change the email address that my payslips come to?

Navigate to E-form preferences (shown on page 16) and change the email address in the email address field marked with the red asterisk and click save to process the changes.

Why can't I change my bank name when updating my new bank details?

Once you have entered your bank details, click 'Save' to complete the update. The bank name will automatically populate only after the changes have been saved. If you do not click 'Save', the bank name will not appear.

10.2. How Do I Access My P45 and Payslips Once I Have Left RBWM?

After receiving your final pay, you can view and download your payslips and P45 from home by following the below steps:

1. Navigate to the ESS homepage at ESS - Login options (webitrent.com)
2. Click on "A different account".
3. Your username will be your payroll reference number.
4. Your password will be your NI number (all uppercase and no spaces).
5. Once logged in, you will be able to view and download the necessary documents.

You will be required to create a memorable password. Please ensure you remember the memorable password as each time you log in you will be asked for 3 specific and different characters from the password.

You will retain ESS access for up to 365 days after your leaving date. After this period, your access will be terminated and any post-period document requests may incur a charge.

10.3. Error Messages

Why am I getting 'check your internet connection' error message?

This error message means 2 things. Either the email address you are using to log in is incorrect, or you are using the incorrect web address for iTrent.

Ensure the email address you are using is your 3 letters and 3 numbers. For example, ABC123@RBWM.GOV.UK.

Please ensure you are using this link for iTrent Self-Service: https://myselfservice.rbwm.gov.uk

Why am I getting *request entity too large*?

This occurs when the request exceeds the servers file size limit. To help fix the issue please follow the next steps.

On Google Chrome:

1. Click on the 3 dots in the top-right corner of the screen.
2. Select 'History' then 'History' again.
3. Click on 'Clear browsing data'.
4. Tick 'Cookies and other site data' & 'Cached images and files'.
5. Click on 'Clear data'.
6. Once cleared, close down Chrome and re-open it. This should then fix the issue

On Microsoft Edge:

1. Click on the 3 dots in the top-right corner of the screen.
2. Select 'History'.
3. Click on the trash icon at the top of the window that opens.
4. Change the 'Time range' option to "All time".
5. Ensure that 'Cached images and Files' & 'Cookies and other site data' are both ticked.
6. Click on 'Clear now'.
7. Close the web browser and re-open it. This should resolve the issue.

10.4. Annual Leave and Absence Queries

How do I cancel booked annual leave?

Future dated: Click on the holiday request which will be sitting in ‘my time’. Then scroll to the bottom and there will be a ‘delete’ button in red. You can then delete the requests according to the ones you do not need.

Past dated: If the annual leave is in the past, your manager will need to delete it from iTrent people manager.

How do I amend annual leave requests?

Click on the holiday request which will be sitting in ‘my time’. In the fields marked with a red asterisk update the holiday information accordingly and click save to process the changes.

How much annual leave can I carry over?

Any remaining annual leave balance up to 5 days will be automatically carried over into your next leave year. If you are approaching the end of your leave year and your remaining balance exceeds 5 days, please remember to get approval from your Assistant Director and email trent.support@rbwm.gov.uk with the confirmation.

What should I do if I had annual leave booked but was off sick during those days?

Before your manager inputs the sickness on the system, either you can delete the annual leave on self service if it is future dated or your manager will need to delete the annual leave if it is past dated. Once this has been deleted, your manager can successfully input the sickness on their end via people manager.