



# **Manager Self Service**

## **LINE MANAGER GUIDANCE**

University of Reading  
2019

# Manager Self Service

## LINE MANAGER GUIDANCE

Dear Line Manager,

You are about to use the Manager Self Service. It has been created to provide you with access to specific employment related information about the people you line manage (e.g. absence/attendance information, leave approval function, details relating to the employee contract, such as visa status, rate of pay, employment contract funding information). There are also some quick links to enable you to, for example, raise a Staffing Request Form (SRF).

You have a **view only** access, therefore please feel free to explore the information available to you. Should you notice that any of the details are recorded incorrectly or are soon to change, please contact HR via email [hr@reading.ac.uk](mailto:hr@reading.ac.uk) and let us know.

Best wishes

HR Team

# Manager Self Service

LINE MANAGER GUIDANCE

## Index

- [Login](#)..... 4
- [Front page](#)..... 5
- [My to do list](#) ..... 5
- [HR website](#) ..... 5
- [Recruitment Gateway](#) ..... 5
- [MSS Guidance](#) ..... 5
- [Main Page](#) ..... 6
- [Calendar](#) ..... 7
- [Authorising leave](#) ..... 10
- [Pay details](#) ..... 12
- [Costing details](#)..... 13
- [Hours and details](#) ..... 14
- [Probation](#) ..... 15
- [Absence link](#) ..... 16
- [Absence history](#)..... 17
- [Work permit](#)..... 18
- [Key dates](#)..... 18
- [Quick links](#)..... 19
- [Email contacts](#)..... 20

# Manager Self Service

## LINE MANAGER GUIDANCE

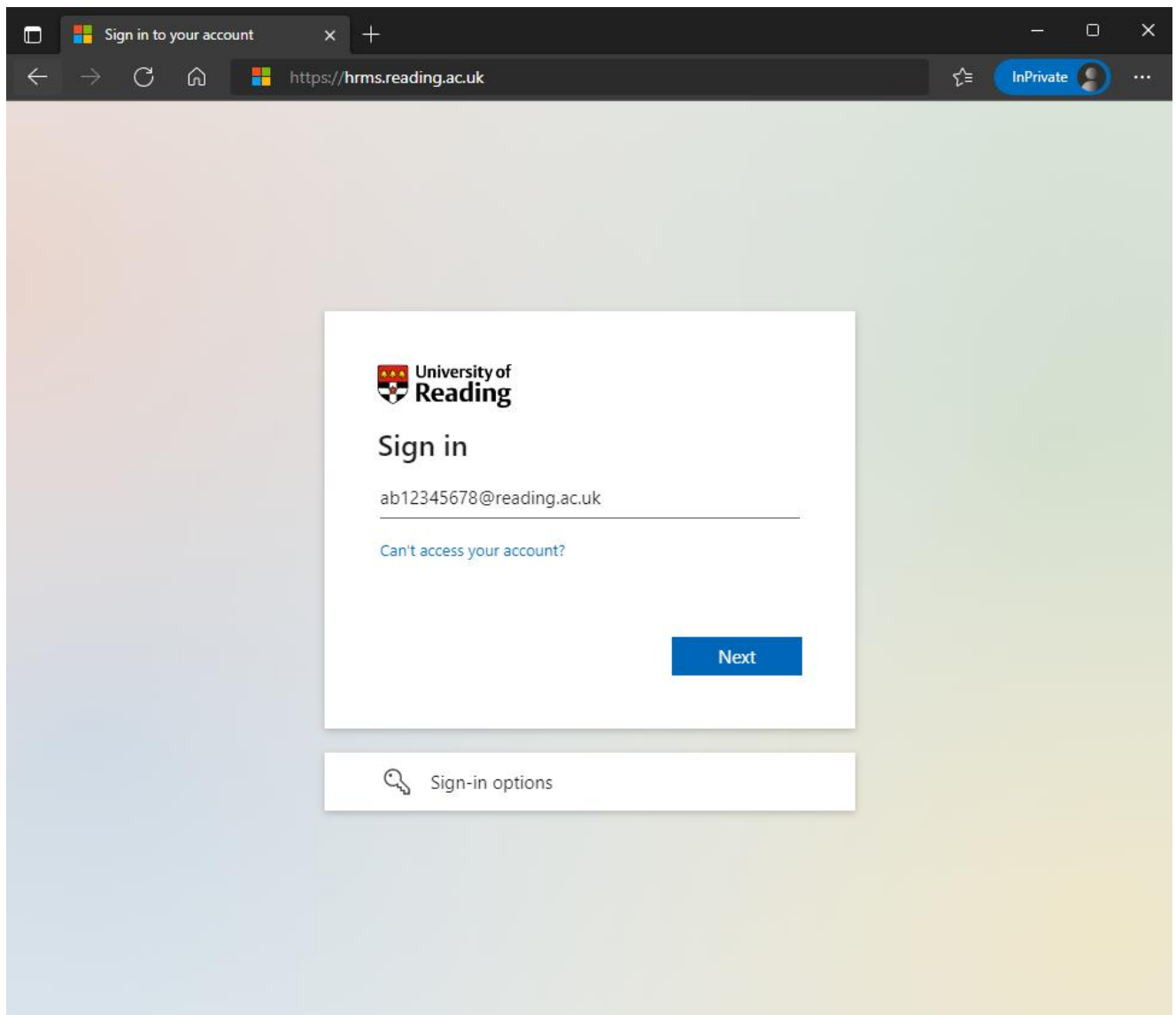
Manager Self Service can be accessed by this link - <https://hrms.reading.ac.uk/>

### On Campus

If you're on campus and are already connected to the University network with your staff details, you will be automatically logged in like how you access other key University services (such as Office 365).

### Off Campus

If you are accessing MSS externally or remotely you may be prompted for 'Additional security verification' prior to gaining access to the MSS login. Follow the onscreen guidance and refer to the [DTS guide for remote service access](#) if you need further help.

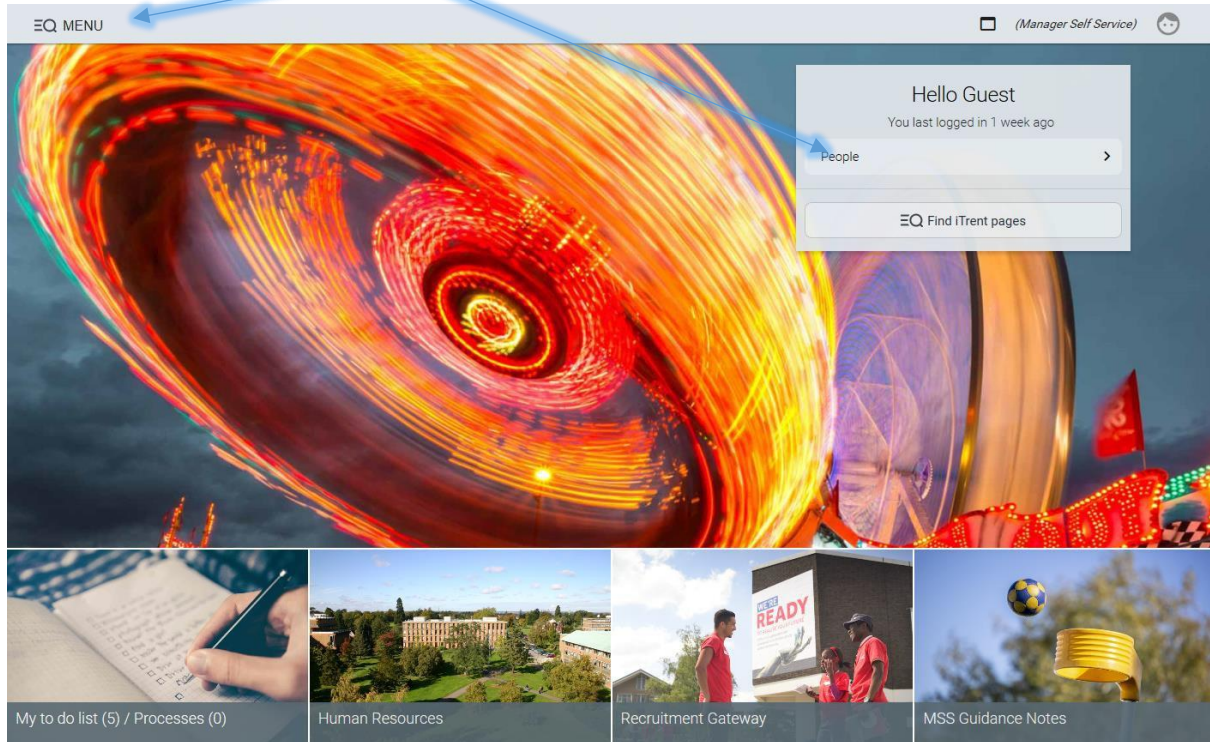


# Manager Self Service

## LINE MANAGER GUIDANCE

The following front-page screen will be shown.

Click on the word **'People'** and choose the employee's name you wish to view from the list on the left. Alternatively click on the **'Menu'** icon.



From the main page you can also access links to other useful pages (these may change over time). For instance:

- **'My to do list'**, to view any holiday absence requests which may require approval
- **Human Resources** website for any HR related information and forms
- **Recruitment Gateway** to raise an SRF, contact Campus Jobs, engage a contractor or contact a Recruitment Agency
- **Manager Self Service (MSS)** guidance notes.

# Manager Self Service

## LINE MANAGER GUIDANCE

Click on the name of the person on the left. After selecting the individual, the **main page** below will appear.

On the right-hand side you can also click between employees.

The screenshot shows the iTrent Manager Self Service interface. On the left is a navigation sidebar with sections for 'ORGANISATION' (University of Reading), 'PEOPLE' (Results 4 People), and a search bar. The 'PEOPLE' section lists: Ms Natalie Drake, Mr Elliot Fisher, Mr Callum Frazer, and Mrs Victoria Sullivan. Ms Natalie Drake is selected. The main content area displays her profile for 'Ms Natalie Drake'. It includes a 'Personal' section with details: Known as Nat, 1 Year(s) 2 Month(s) in service, 919160 (Personal ref.), JH123456A (Social security), n.drake@reading-ac-uk (Work), and 4657 (Work). The 'Employment' section shows: Acquisitions Operative Import Services, 35.00 hours Full time Permanent Framework Grade 6, Started on 20/06/2018, and Reporting manager Dr Guest Manager Import Director. Below this is a 'Calendar' section for '19 Aug - 01 Sep 2019', showing a calendar grid and two circular gauges: 'Holidays remaining (as of last calculation)' at 3 of 45 days, and 'Days off sick (as of last calculation)' at 5 days. At the bottom is a 'LINKS' section with buttons for Employment, Absence, Personal information, Quick Links, and Email Contacts, along with sub-links for Pay details, Costing details, Hours & Basis details, and Probationary period details.

NB! Please contact the [HR Operations team](#) if there is anyone on the list of employees whom you do not line manage, if someone is missing or if they are leaving.

This is a summary page, where it is possible to access the following:

- Employee's **personal information** – which also leads through to the Key dates screen (further details below)
- **Employment details** – leading through to the Hours and basis screen and the Payscale values screen
- **Leave calendar** – to view their full calendar, holidays, days off sick
- **Links** – to various contractual details, absence, quick links and email contacts.



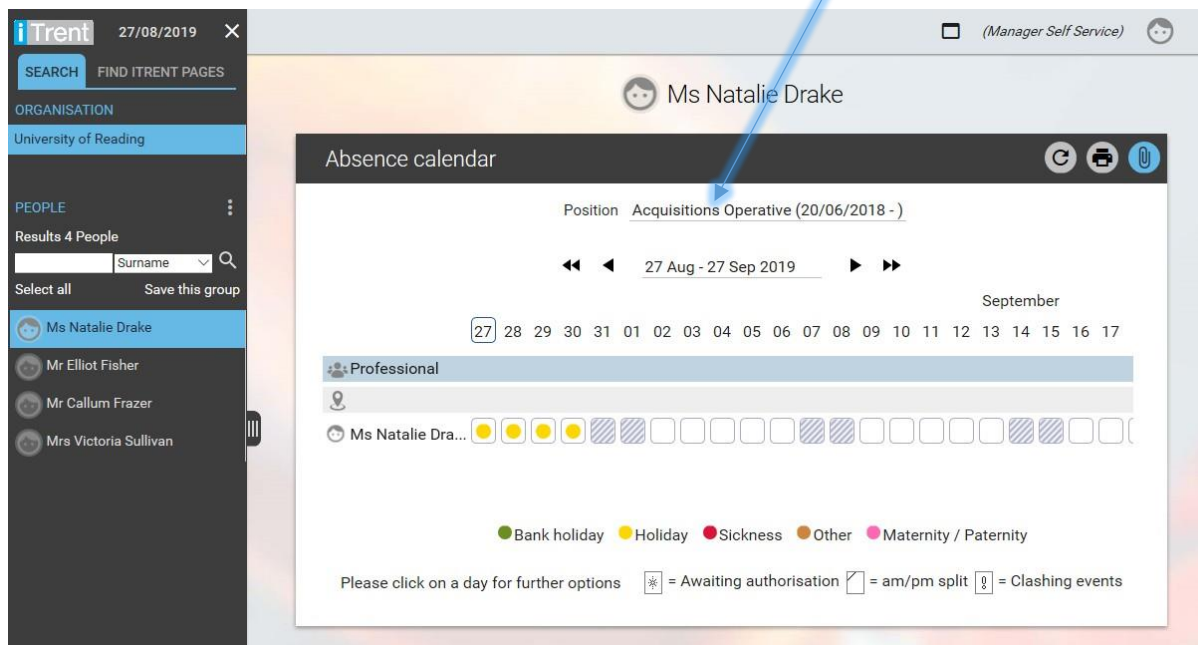
# Manager Self Service

## LINE MANAGER GUIDANCE

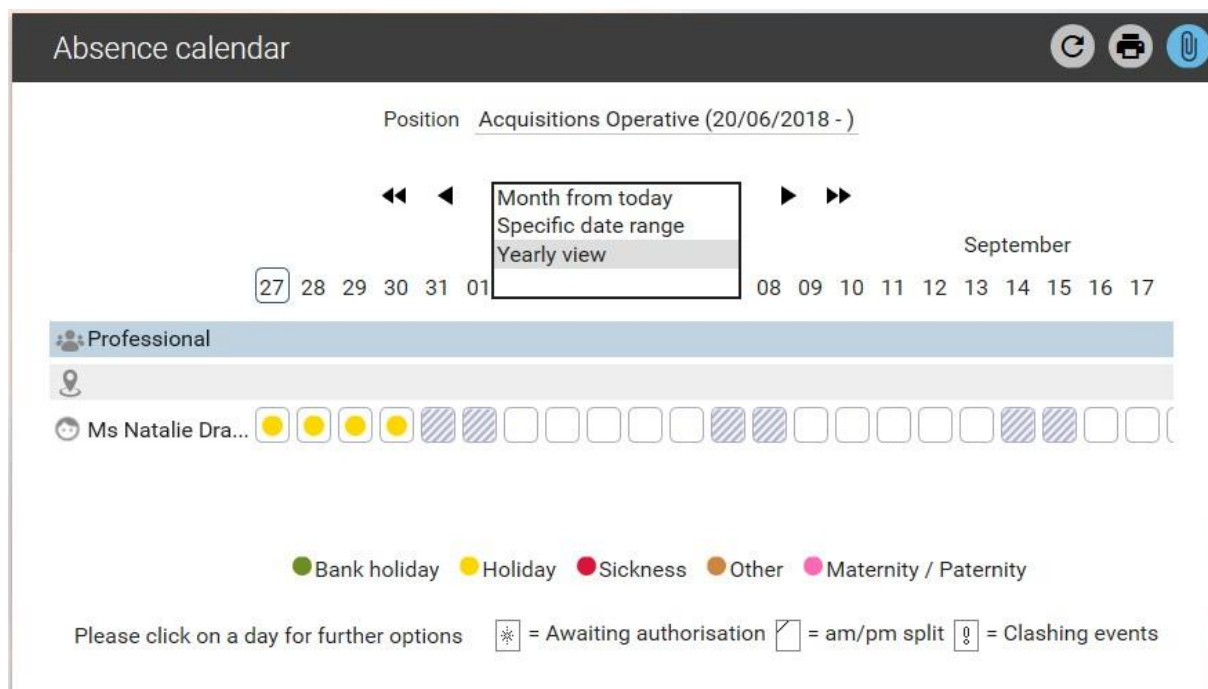
### Calendar

To access the full calendar, please click on the  **VIEW FULL CALENDAR** icon on the main page.

The following page will appear. Here it is possible to **switch between positions** (if the individual has several roles).



You can select a different date range (Month from today, Specific date range or Yearly view) and see what type of leave the employee has booked (Holiday, Bank holiday, Maternity/Paternity, Other).



# Manager Self Service

## LINE MANAGER GUIDANCE

The following screen will then appear.

This is one person's yearly calendar view, please note that it is not possible to compare multiple employees' calendars at the same time.

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake. The left sidebar contains navigation options: SEARCH, ORGANISATION (University of Reading), and PEOPLE (Results 4 People). The main content area displays the 'Absence calendar' for the year 2019, from 01 Jan to 31 Dec. The calendar grid shows various absence types: Bank holiday (green), Holiday (yellow), Sickness (red), Other (orange), and Maternity / Paternity (pink). A legend at the bottom explains the symbols: a green circle for Bank holiday, a yellow circle for Holiday, a red circle for Sickness, an orange circle for Other, and a pink circle for Maternity / Paternity. Below the legend, there are instructions: 'Please click on a day for further options', '\* = Awaiting authorisation', a square icon for 'am/pm split', and a square icon for 'Clashing events'.

Click here to enter the **Holiday Entitlement Screen**

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake, displaying the 'Holiday Entitlement Screen'. The left sidebar is the same as in the previous screenshot. The main content area is divided into several sections: 'Personal' information (Known as Nat, 1 Year(s) 2 Month(s) in service, 919160 (Personal ref.), JH123456A (Social security), n.drake@reading-ac-uk (Work), 4657 (Work)), 'Employment' information (Acquisitions Operative Import Services, 35.00 hours Full time Permanent Framework Grade 6, Started on 20/06/2018, Reporting manager Dr Guest Manager Import Director), and a 'Calendar' section. The 'Calendar' section shows a view for 19 Aug - 01 Sep 2019. Two circular gauges display '3 of 45 days' for 'Holidays remaining (as of last calculation)' and '5 days' for 'Days off sick (as of last calculation)'. Below the calendar, there are 'LINKS' to various sections: Employment, Absence, Personal information, Quick Links, Email Contacts, Pay details, Costing details, Hours & Basis details, and Probationary period details.



# Manager Self Service

## LINE MANAGER GUIDANCE

### Holiday Entitlement Page

From the main page, it is also possible to access the **Holiday Entitlement Screen**, which shows a list view of all the Annual Leave booked, Bank holidays and Closure days.

Please note that the total holiday allowance is made up of **bookable leave + Bank holidays and Closure days**. Should the employee leave before their fixed term contract ends or before the end of the annual leave year, their entitlement will be **calculated pro-rata**.

The system will also allow to:

- Look at their entitlement in different roles
- Review previous annual leave years.

The screenshot shows the 'Holiday entitlement summary' page for Ms Natalie Drake. The page is titled 'Ms Natalie Drake' and 'Holiday entitlement summary'. It displays the following details:

- Employment details:** Position: Acquisitions Operative
- Period details:**
  - Holiday period dates: 01/10/2018 - 30/09/2019
  - Length of service at relevant date: 0 year(s) 3 month(s) 11 day(s)
  - Scheme name: Holiday - Grade 6 and above Days
  - Membership dates: 20/06/2018 -
  - Entitlement for period: 45 days (40 days Pro Rata) (5 brought forward)

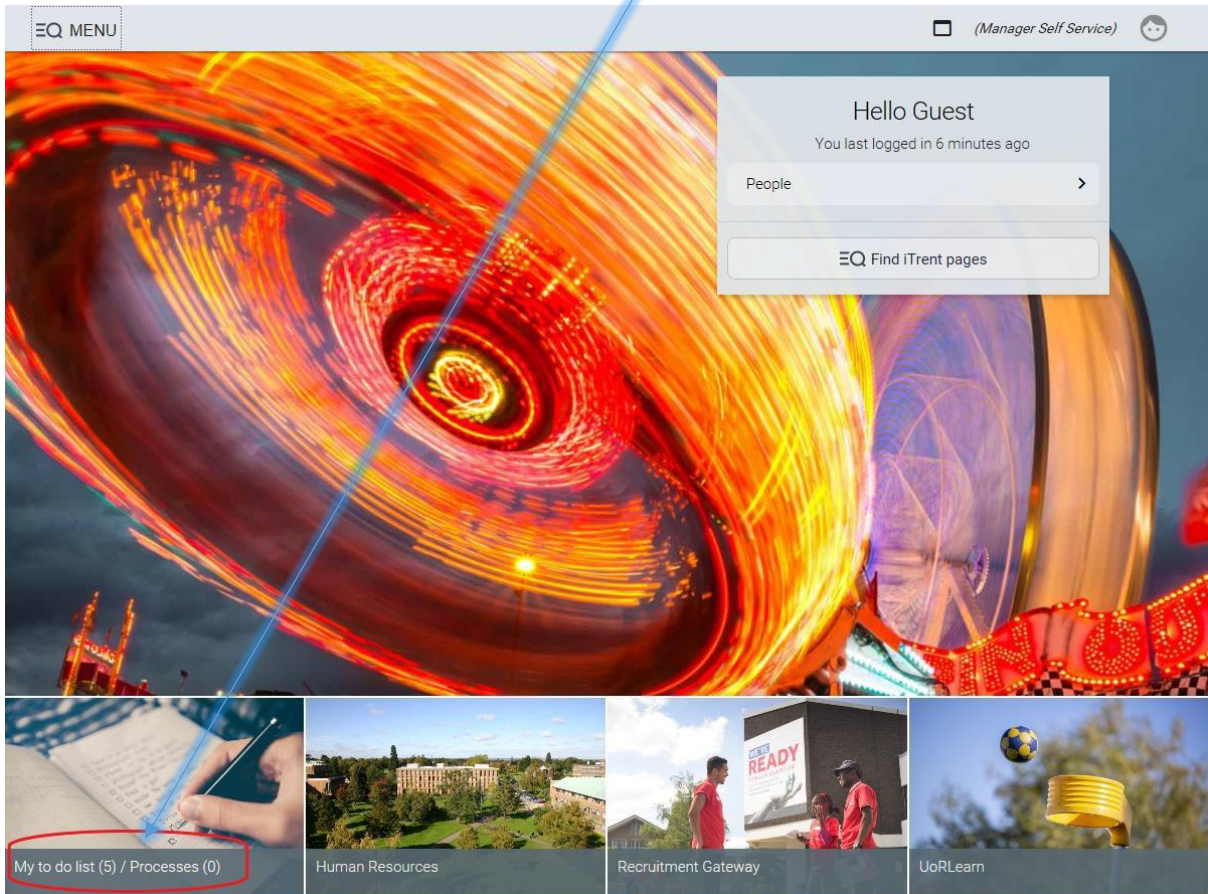
From	To	Duration	Remaining entitlement
01/10/2018	01/10/2018	1	44
09/10/2018	09/10/2018	0.5	43.5
01/11/2018	01/11/2018	0.5	43
18/12/2018	18/12/2018	1	42
24/12/2018	24/12/2018	1	41
25/12/2018	25/12/2018	1	40
26/12/2018	26/12/2018	1	39
27/12/2018	27/12/2018	1	38
28/12/2018	28/12/2018	1	37
31/12/2018	31/12/2018	1	36
01/01/2019	01/01/2019	1	35
08/01/2019	08/01/2019	0.5	34.5
06/02/2019	06/02/2019	0.5	34

NB: For any **further queries regarding absence**, please follow this link to our [Absence and leave page](#) or to our [Employee Self Service Absence](#) page.

Our **Family Leave policies** can be found [here](#).

## Authorising Leave

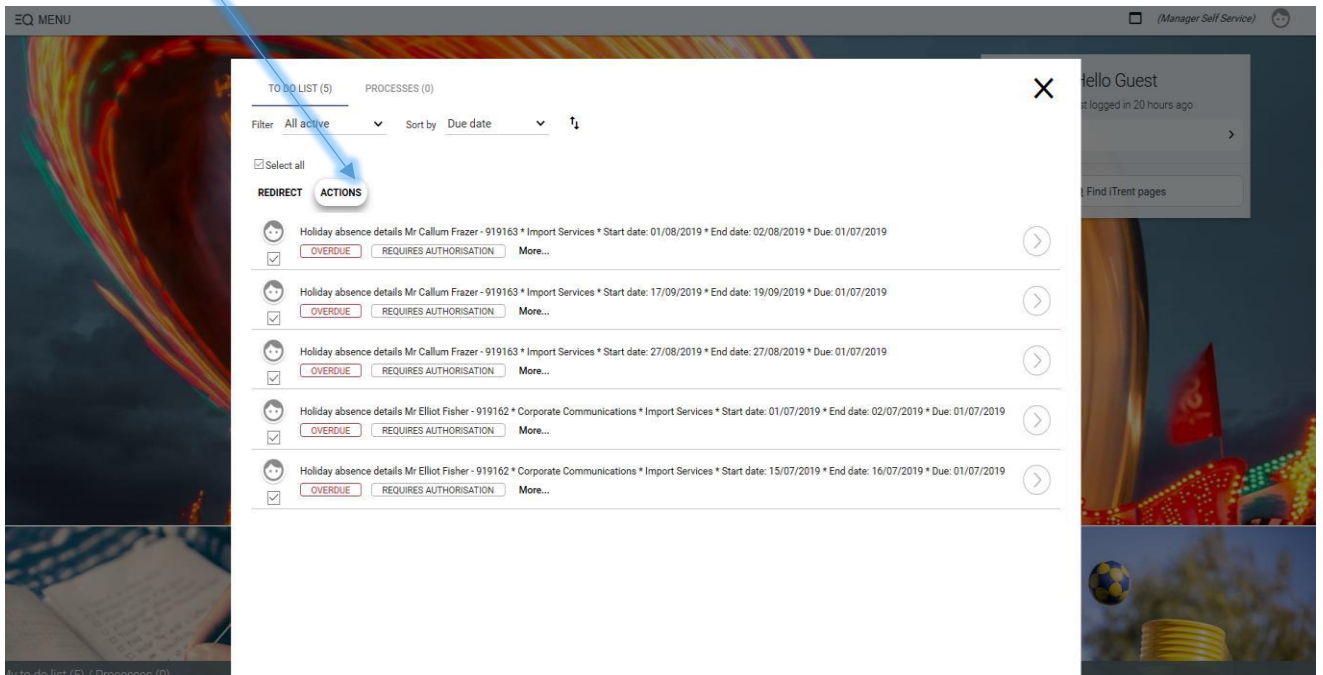
In order to authorise leave, click on the highlighted 'My to do list/processes' tab. Please note that this can still be done via ESS as well.



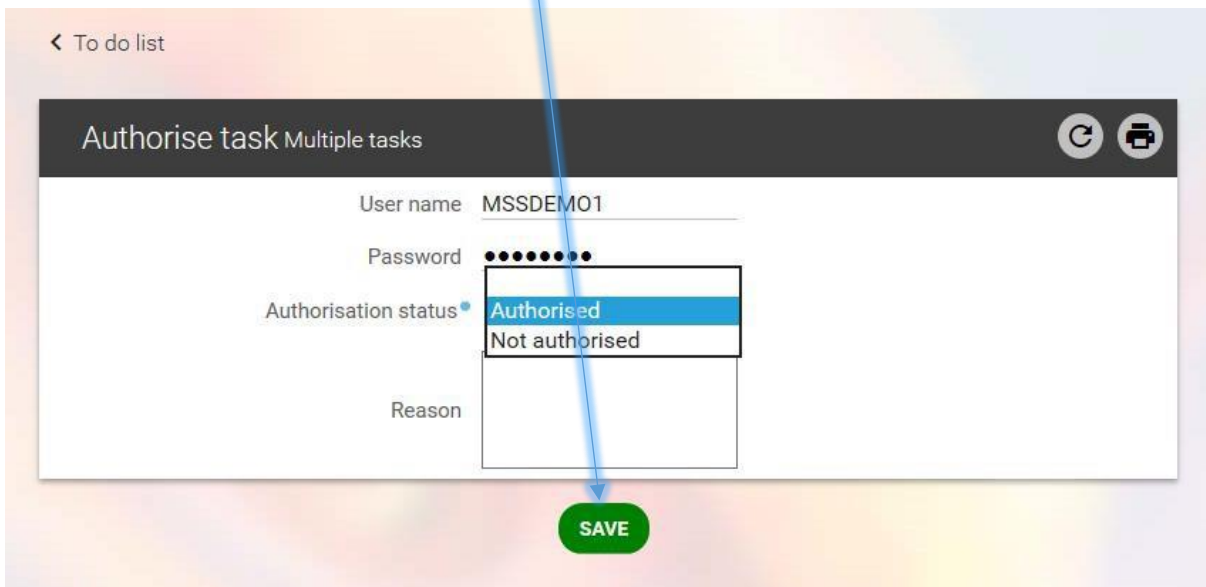
# Manager Self Service

## LINE MANAGER GUIDANCE

To authorise requests for holiday for multiple days and/or from a number of staff in your team – select **Actions** tab.



Authorise screen with options expanded (**save** to complete).



### Links

Links will give you quick access to other contractual information.

The screenshot displays the iTrent Manager Self Service interface for Ms Natalie Drake. The interface is divided into several sections:

- Personal Information:** Known as Nat, 1 Year(s) 2 Month(s) in service, 919160 (Personal ref.), JH123456A (Social security), n.drake@reading-ac-uk (Work), 4657 (Work).
- Employment Information:** Acquisitions Operative Import Services, 35.00 hours Full time Permanent Framework Grade 6, Started on 20/06/2018, Reporting manager Dr Guest Manager Import Director.
- Calendar:** 19 Aug - 01 Sep 2019, 3 of 45 days Holidays remaining, 5 days Days off sick.
- LINKS:** Employment, Absence, Personal information, Quick Links, Email Contacts. The 'Pay details' tab is highlighted under the Quick Links section.

To view an employee's salary details, please click on the **Pay details** tab on the Quick menu. The same information can also be found under the **Employment tab**.



# Manager Self Service

## LINE MANAGER GUIDANCE

The following page will appear. Please follow this [link](#) to view our current Salary Scales and on costs.

The **increment dates** depend on employees' contract type. 1<sup>st</sup> August (Grades 1- 5 Academic Administrative Support roles) 1<sup>st</sup> October (Grades 6 – 8 Professional and Managerial roles and Grades 6 – 8 Academic roles) and the anniversary of their appointment for Research posts.

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake. The left sidebar contains navigation options for Organisation (University of Reading), People (4 results), and Positions (Acquisitions Operative). The main content area displays 'Payscale values (as of 02/09/2019)' for an Acquisitions Operative. A blue arrow points from the 'Next increment date' field to the text above.

Field	Value
Grade	Framework Grade 6
FT Salary	F29 -- 32,236.00
Protected	
Grade minimum	F27 -- 30,395.00
Grade maximum	F40 -- 44,559.00
Next increment date	01/08/2019
FTE value (rounded to 5 DP)	1.00000
Pro-rated rate of pay	32,236.00

Click on the **Costing details** tab, to view the Account code, Cost code and Project code. Please note that you will need to raise an SRF to change any of this information.

You will need to expand the **side menu** to view the details.

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake. The left sidebar is expanded to show 'Structure Costing' details. The main content area displays 'Employment' information for Ms Natalie Drake, including her reporting manager and holiday/sick leave status. A blue arrow points from the 'Costing details' tab to the 'Structure Costing' table.

Costing level	Length	Cost code	Percent	Value	Start date	End date
Account Code	4	3100	100.000		20/06/2018	
Cost Code	4	MBCP	100.000		20/06/2018	
Project Code	8	A2902000	100.000		20/06/2018	

# Manager Self Service

## LINE MANAGER GUIDANCE

**Hours and Details** tab provides information about contractual working hours.

**NB!** Please raise an SRF if there are any changes to the below or notify the [HR team](#) of any **working pattern changes**.

Where the request for a change of hours or working pattern has come from an individual, please ask the individual to complete a [Flexible Working Request form](#) and if you approve the request you will need to raise an SRF to confirm then proposed change and effective date.

Please make sure you contact your area [HR Advisor](#) for advice where needed **before** agreeing any permanent changes to hours of work, flexible retirement or extending a fixed term contract.

The screenshot displays the iTrent Manager Self Service interface. On the left is a navigation sidebar with sections for ORGANISATION (University of Reading), PEOPLE (Results 4 People, including Ms Natalie Drake, Mr Elliot Fisher, Mr Callum Frazer, and Mrs Victoria Sullivan), and POSITIONS (Acquisitions Operative). The main content area shows the profile for Ms Natalie Drake, with a sub-section titled 'Hours and basis' (as of 03/09/2019) for the role of Acquisitions Operative. This section contains a table with the following data:

Field	Value
Contractual Hours	35.00
FTE hours	35.00
Annual weeks worked	52.143
Basis	Full time
Type	Permanent

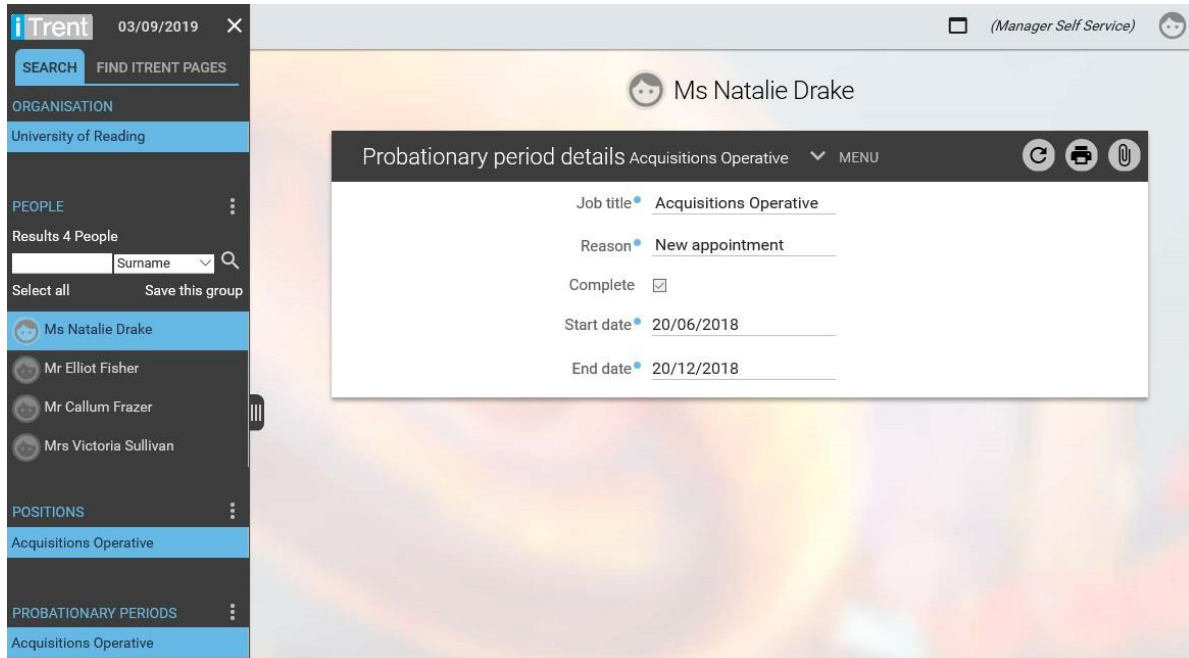


# Manager Self Service

## LINE MANAGER GUIDANCE

Click on the **Probationary period details tab** to obtain information about an employee's probationary period.

For further information about University's Academic (newly appointed Lecturers) and Contractual (all other employees) probation, please follow this [link](#).



# Manager Self Service

## LINE MANAGER GUIDANCE

The **Absence** link will bring up the Holiday Absence Details Screen for further information about an employee's leave.

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake. The left sidebar contains navigation options like 'PEOPLE' and 'HOLIDAY ABSENCE LIST'. The main content area displays personal and employment details, a calendar, and a 'LINKS' section. The 'Absence' link in the 'LINKS' section is highlighted with a blue arrow.

The screenshot shows the 'Holiday absence details' screen for Ms Natalie Drake. The left sidebar contains a 'HOLIDAY ABSENCE LIST' with dates from 15/02/2019 to 19/08/2019. The main content area displays the details for a holiday period from 19/08/2019 to 30/08/2019, including the absence type (Personal Holiday), authorisation (Authorised), and position (Acquisitions Operative (Current)). A table below shows holiday balances for Acquisitions Operative - Holiday - Grade 6 and above Days.

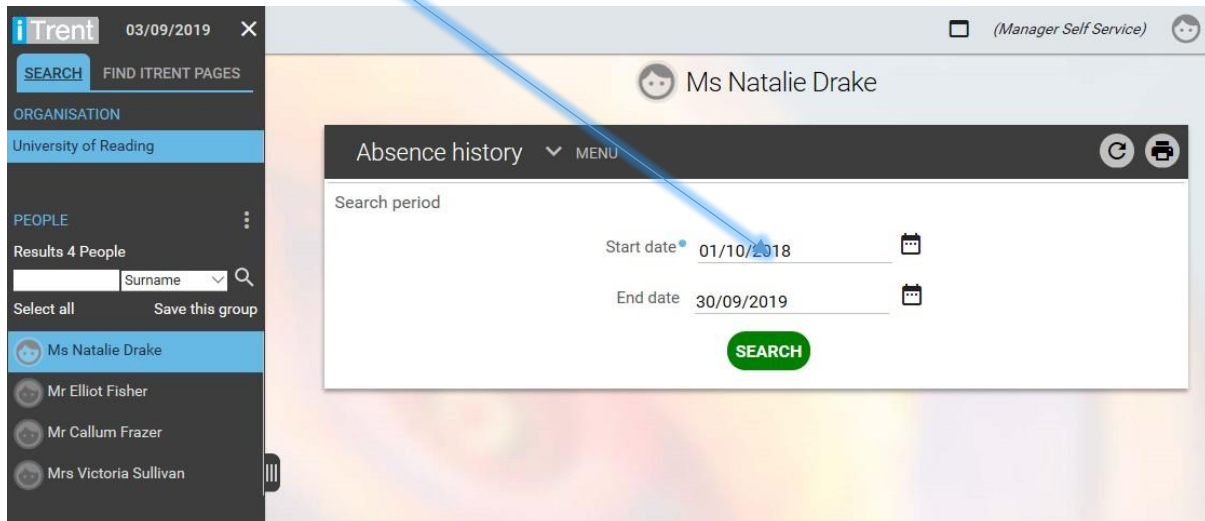
Holiday period	Entitlement	Taken	Scheduled	Balance
20/06/2018 - 30/09/2018 (Part)	11.5 D	5 D	0 D	6.5 D
01/10/2018 - 30/09/2019	45 D	42 D	0 D	3 D
01/10/2019 - 30/09/2020	40 D	0 D	0 D	40 D

This information can also be accessed when you hover over the dates on the left.

# Manager Self Service

## LINE MANAGER GUIDANCE

Click on the **Absence history tab**, to view leave within a specific time period. Please enter the date range you are interested in reviewing.



The following screen will appear.

The screenshot shows the Manager Self Service interface for Ms Natalie Drake. The left sidebar contains navigation options for Organisation (University of Reading) and People (Results 4 People). The main content area displays the 'Absence history' tab with a search bar and a table of absence records.

Start date	End date	Type	Reason	Auth status	Job title	Working days lost
01/10/2018	01/10/2018	Personal Holiday		Authorised	Acquisitions Operative	1
09/10/2018 PM	09/10/2018 PM	Personal Holiday		Authorised	Acquisitions Operative	0.5
11/10/2018	12/10/2018	Sickness	Digestive/Stomach/Urinary	Not applicable	Acquisitions Operative	2
01/11/2018 PM	01/11/2018 PM	Personal Holiday		Authorised	Acquisitions Operative	0.5
18/12/2018	18/12/2018	Personal Holiday		Authorised	Acquisitions Operative	1
24/12/2018	24/12/2018	Bank holiday			Acquisitions Operative	1
25/12/2018	25/12/2018	Bank holiday			Acquisitions Operative	1
26/12/2018	26/12/2018	Bank holiday			Acquisitions Operative	1
27/12/2018	27/12/2018	Bank holiday			Acquisitions Operative	1
28/12/2018	28/12/2018	Bank holiday			Acquisitions Operative	1
31/12/2018	31/12/2018	Bank holiday			Acquisitions Operative	1
01/01/2019	01/01/2019	Bank holiday			Acquisitions Operative	1
08/01/2019 PM	08/01/2019 PM	Personal Holiday		Authorised	Acquisitions Operative	0.5

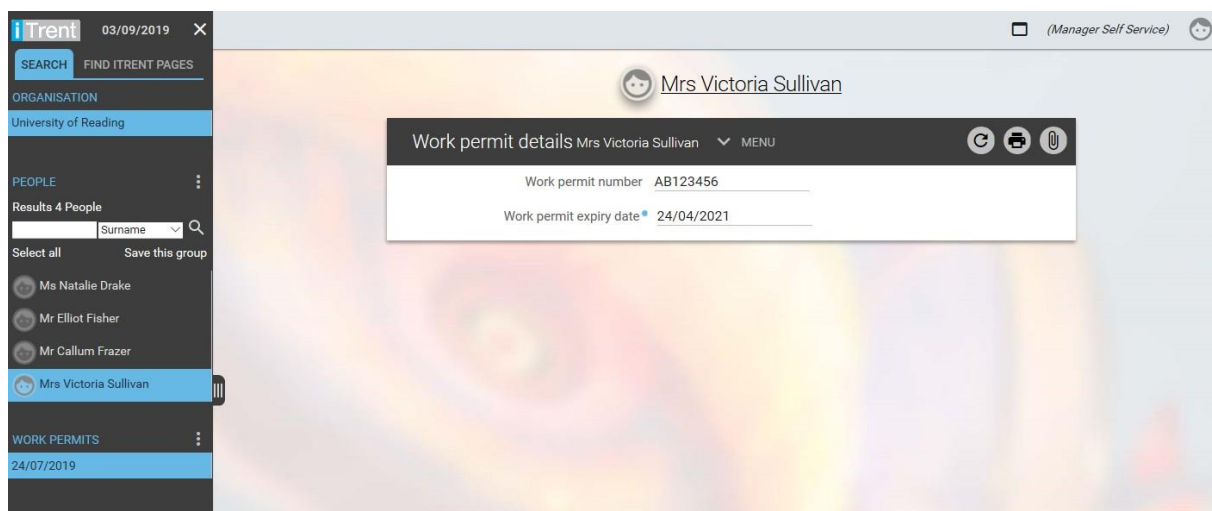
This may be useful for using it in conjunction with the calendar, to understand patterns of absence. Please contact your area [HR Advisor](#) if you have any concerns.

# Manager Self Service

## LINE MANAGER GUIDANCE

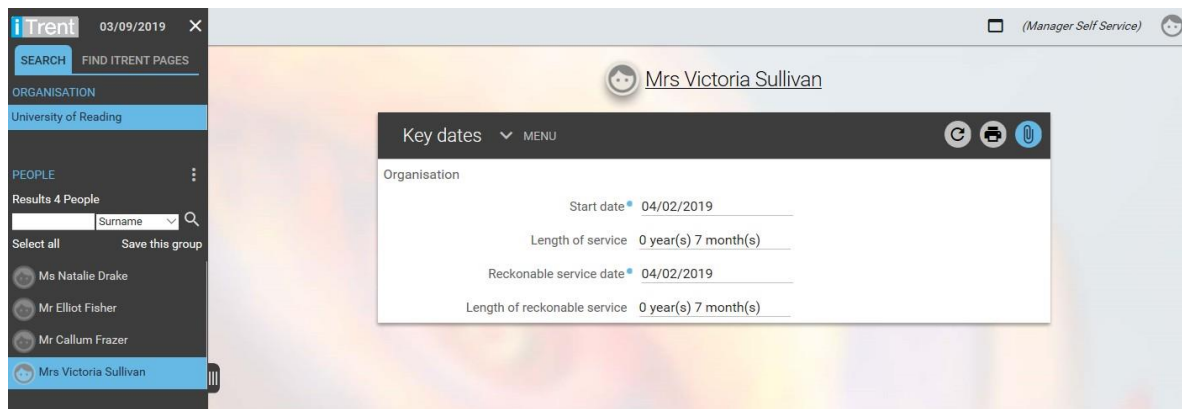
Click on the **Personal Information tab**, to view information about **work permits** and when they end, especially when planning to extend fixed term contracts of employment. Please visit our [Immigration and Visas \(including Visitors\)](#) page if you have any further questions about visas.

The following screen will appear.



Click on the **Key Dates screen**, to view information about the employee's start date, length of service, reckonable service date and length of employment at the University.

This may be useful for submitting reward cases or for calculating redundancy entitlement.



# Manager Self Service

## LINE MANAGER GUIDANCE

The **Quick Links** tab provides line managers with easy access to many useful websites.

The screenshot displays the iTrent Manager Self Service interface for Ms Natalie Drake. The interface is divided into several sections:

- Personal Information:** Known as Nat, 1 Year(s) 2 Month(s) in service. Personal ref. 919160, Social security JH123456A. Email: n.drake@reading-ac-uk (Work), Phone: 4657 (Work).
- Employment:** Acquisitions Operative Import Services, 35.00 hours Full time Permanent Framework Grade 6, Started on 20/06/2018. Reporting manager: Dr Guest Manager, Import Director.
- Calendar:** View Full Calendar for 04 - 17 September 2019. Shows 3 of 45 days of holidays remaining and 5 days off sick.
- LINKS:** A row of tabs: Employment, Absence, Personal information, **Quick Links** (highlighted with a blue arrow), and Email Contacts. Below the tabs are buttons for: Staffing Request Form (SRF), Human Resources, HR Forms, Change of details?, Absence & Leave information, and UoRLearn.

Click on the following:

- **Staffing Request Form (SRF) tab**, to raise an SRF
- **Human Resources tab**, to access the HR webpage
- **HR Forms tab**, to access forms line managers may require
- **Change of details tab** takes you to the HR page with further information on how to change details. For instance: bank details, name/title, address, reporting manager, job title, working hours, working pattern, Account Code/Salary Costing information, Organisational/Unit structure.

# Manager Self Service

## LINE MANAGER GUIDANCE

Click on the **Email Contacts** tab, to contact HR regarding working pattern changes (if there is no change to the hours worked) and to request a change of reporting manager. To maintain accuracy and in order to avoid complications, this has to be done *before* the changes takes effect.

The screenshot shows the iTrent Manager Self Service interface for Ms Natalie Drake. The interface is divided into several sections:

- Header:** iTrent logo, date 04/09/2019, and a search bar.
- Left Sidebar:** Organisation (University of Reading), People (Results 4 People), and a list of people including Ms Natalie Drake, Mr Elliot Fisher, Mr Callum Frazer, and Mrs Victoria Sullivan.
- Profile Card:** Personal information (Known as Nat, 1 Year(s) 2 Month(s) in service, 919160 (Personal ref.), JH123456A (Social security), n.drake@reading-ac-uk (Work), 4657 (Work)) and Employment information (Acquisitions Operative Import Services, 35.00 hours Full time Permanent Framework Grade 6, Started on 20/06/2018, Reporting manager Dr Guest Manager Import Director).
- Calendar:** View Full Calendar, 04 - 17 September 2019, and two circular gauges: Holidays remaining (3 of 45 days) and Days off sick (5 days).
- LINKS:** A row of tabs: Employment, Absence, Personal information, Quick Links, and Email Contacts. Below the tabs are two buttons: Change of Working Pattern and Change a Reporting Manager.

A blue arrow points from the text above to the **Email Contacts** tab in the LINKS section.

End of Document



# Manager Self Service

## LINE MANAGER GUIDANCE

Version Control:

Version 1, December 2019.