

MSS - Introduction to Manager Self Service

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1. Introduction

Welcome to your new Manager Self Service (MSS) system provided by MHR iTrent.

A key feature of the new system is its self-service functionality, allowing for staff and managers to view and amend certain details themselves.

iTrent can be accessed from work, home, and any smart device.

MSS also provides useful system and email notifications to help you stay informed of changes to your staff records and keep you up to date with your day-to-day tasks.

This guide provides you with the information you will need to log into and navigate around MSS.

As a Line Manager user, you will only have access to the information related to staff who report to you. This information will include some personal information and details, it is important that you use it responsibly to ensure that the security of your employees' data is always maintained.

Line Managers are required to ensure that they follow the [Corporate Information Security Policy, Conditions of Acceptable Use](#) and align to the corporate requirements for data processing.

Help / Queries:

For help accessing or navigating to the Employee and Manager Self Service systems, please contact the HR / Payroll team.

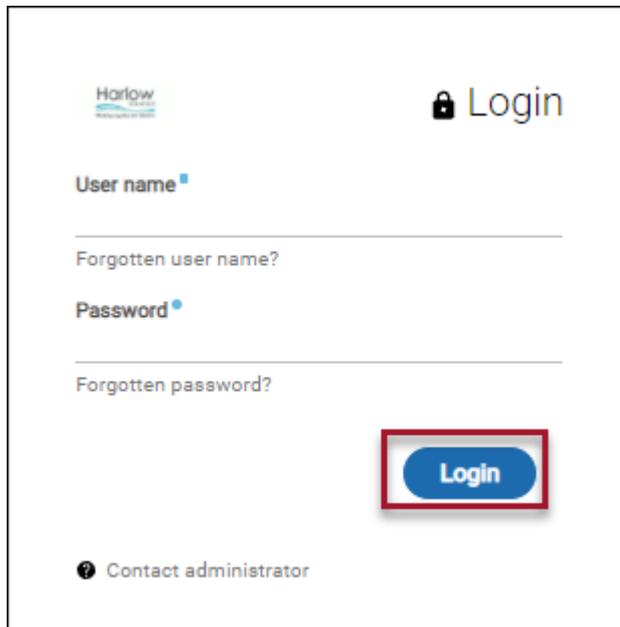
2. Logging into Manager Self Service

To login to MSS, use the following link: https://ce0549li.webitrent.com/ce0549li_web

For ease, please ensure you save this URL in your favourites.

Please note: When logging in to MSS, you will need to use the same username and password you have set up for ESS. Please see either the **Introduction to Employee Self Service** guide or pay within Kaonet for more information.

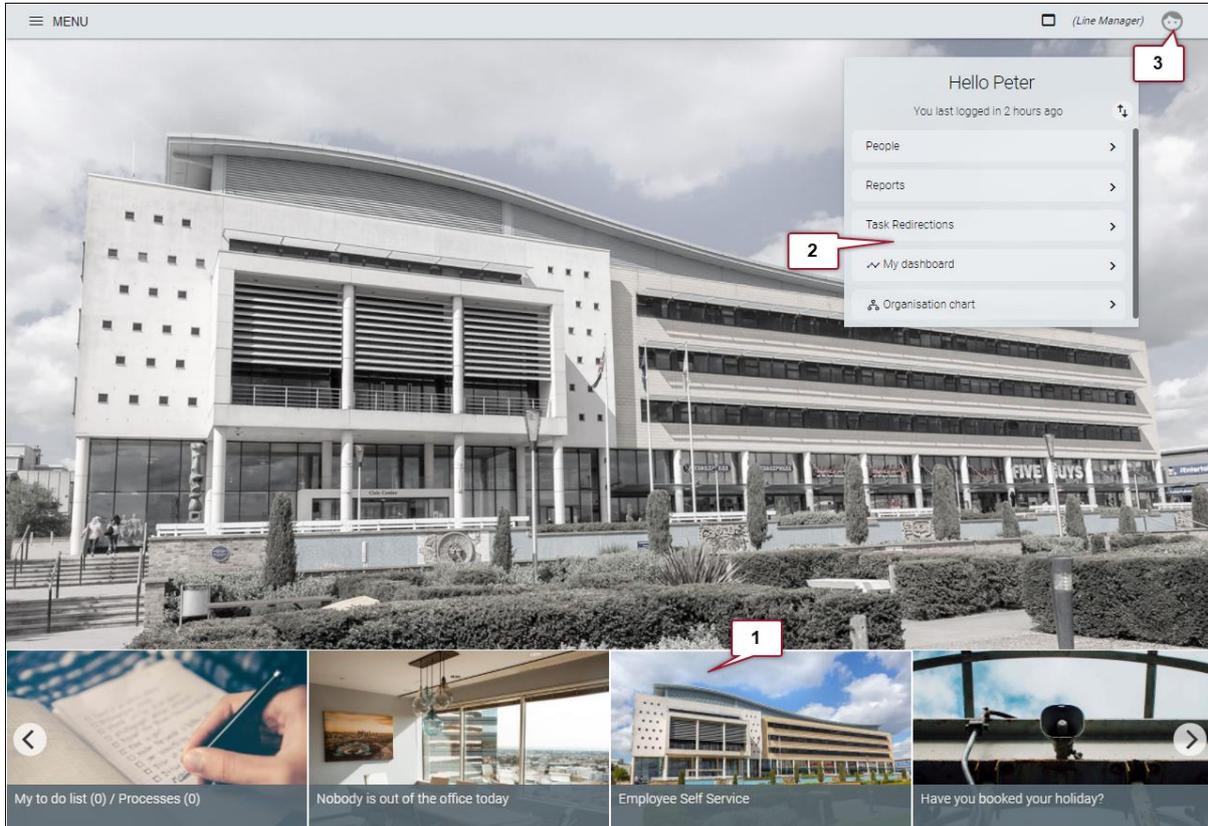
1. Click on the MSS link to be taken to the **Login** screen:



2. Enter your **Username** and **Password** and click **Login**

3. Manager Self Service Home Screen

When you log into MSS you will be presented with the **Home** screen.

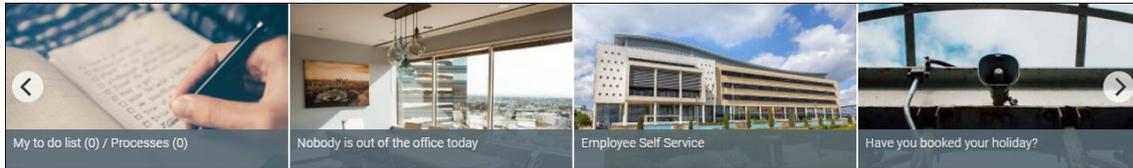


The **Home** screen can be split into three main sections:

	Section	Definition
1.	The Carousel	The Carousel provides access to your To do list, Out of office calendar, Organisation Structure, Dashboards and the latest company news.
2.	Sections menu	The Sections menu gives you access to different areas of MSS where you can view employee information, record sickness, run reports and more.
3.	Profile button	The Profile button remains present throughout, and gives you access to your tasks and processes and the option to Log off.

4. The Carousel

The carousel provides access to task notifications, out of office (Team calendar), company news items, the organisation chart and manager dashboards.



Use the left and right arrows to scroll through items on the carousel.

My To do list / Processes

My To do list / Processes will show the number of tasks that need to be actioned.

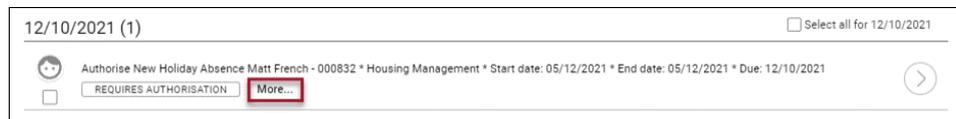
1. Click on the card to view your current tasks:



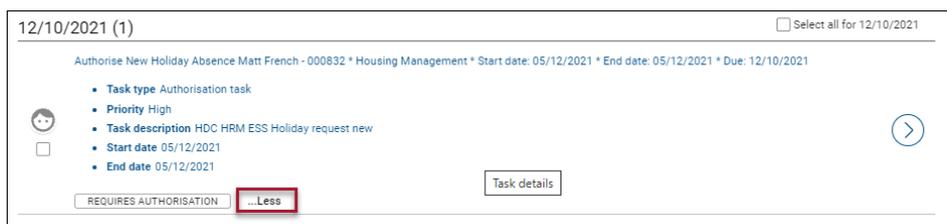
2. Tasks will be displayed in date order with tasks due soonest at the top. Tasks may be filtered and sorted, or you can search for a specific task, by task type or employee name, using the search field:



3. This example below shows a holiday request awaiting authorisation:

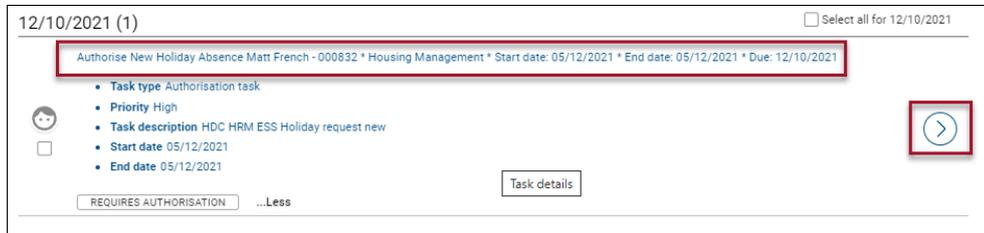


4. To view more details relating to the task, click on the **'More...'** link:

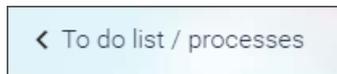


5. Clicking **'...Less'** will collapse the view

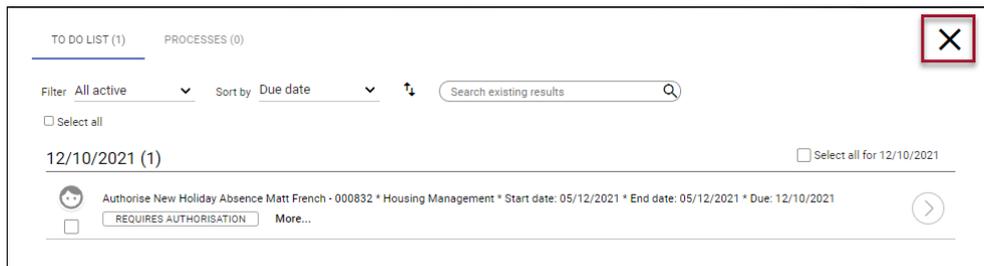
6. Clicking on the task header or the right facing arrow will open the screen for you to view the task details:



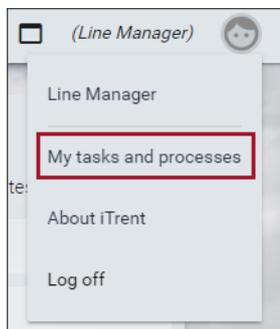
7. Actioning tasks will be covered in more detail in the **MSS - Absence** guide
8. Click the link at the top of the page to return to the **To do list**:



9. Close the **To do list** by clicking the cross:



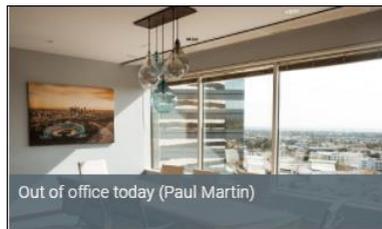
10. The **To do list** may also be accessed at any time by clicking the **Profile** button at the top of the **Home** screen and selecting the **My tasks and processes** option, this option is available throughout iTrent providing easy access to your tasks at any time without having to return to the **Home** screen:



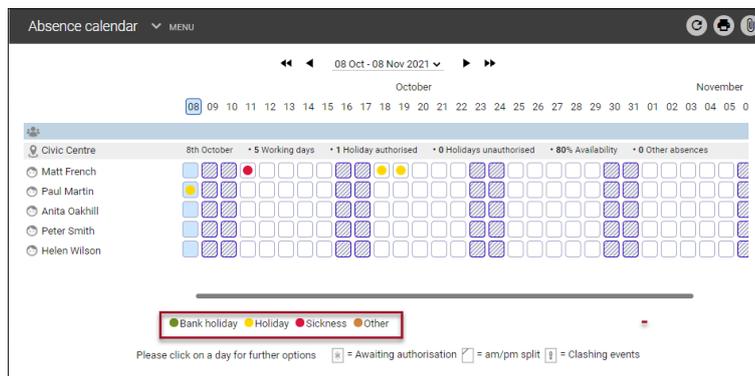
Out of office

The **Out of Office** card on the carousel displays the names of your first line staff who are out of the office today, or, if there are too many individual names to fit on the card, the number of absent staff will be displayed instead.

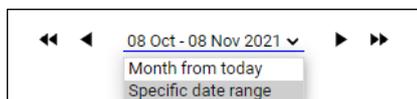
1. Click on the card to view the **Absence calendar**:



2. The **Absence calendar** will display absence information for you and your first line staff, up to a month from today's date
3. Absences are indicated by the coloured dots as defined in the key at the bottom of the page:



4. Use the left and right arrows to move the calendar forwards or backwards by 1 or 3 months or use the dropdown to select and enter a specific date range to display:



5. Further information on using the **Absence calendar** is detailed in the **MSS - Absence** guide
6. Click on the Harlow council logo in the left-hand pane to return to the **Home** screen

Company News

Council HR and Payroll news items will be available within the carousel at the bottom of the **Home** screen.



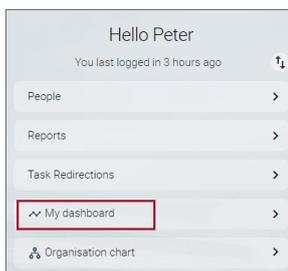
1. Click on a company news item to open the pop-up window and display the relevant information, in this example a link to **Employee Self Service** is provided:



2. Click the cross to close the pop up
3. There may be several articles published and these may change from time to time and relevant important information will be added.

My Dashboard

Dashboards can be accessed via the section on the right-hand menu and from the **My dashboard** card on the carousel.



1. Click on the card to access the **Absence dashboard** for your staff
2. Expand the dashboard by clicking the down arrow on the right-hand side:

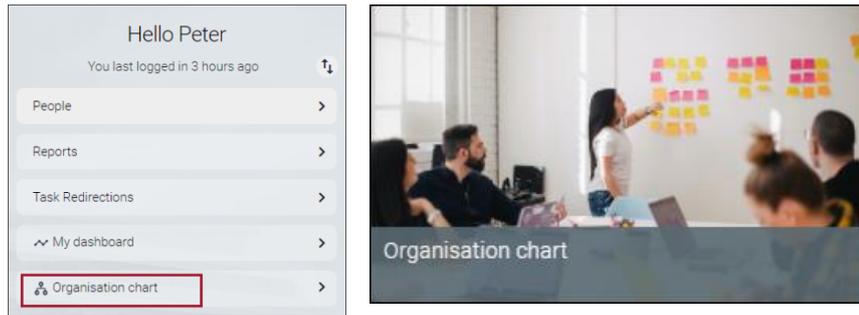


3. Dashboards are explained in further detail in the **MSS - Dashboards and Reports** guide.

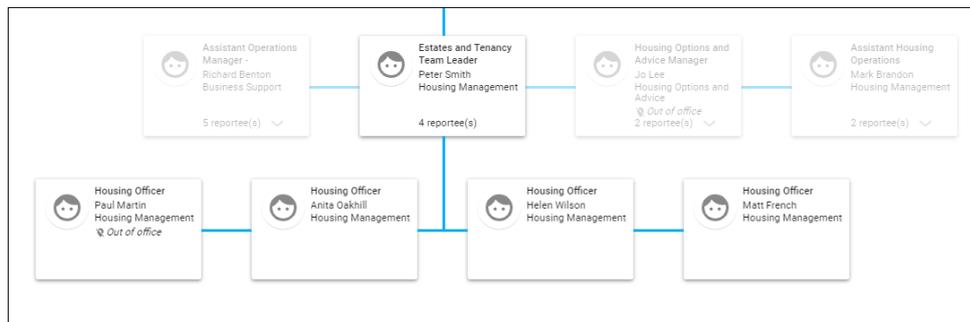
Organisation Chart

The organisation card allows you to see the company organisation structure.

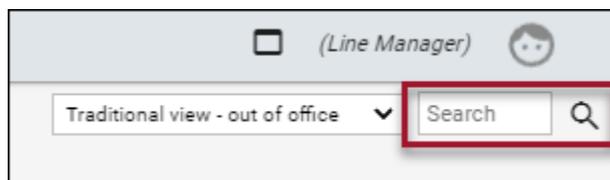
1. Select **Organisation chart** from the right-hand menu or click on the card available on the carousel to open the organisation chart:



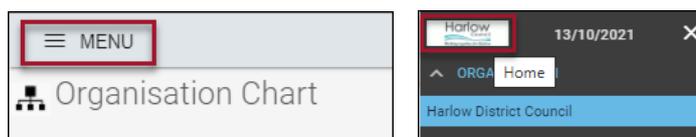
2. The organisation chart will open with your team at the centre of the chart
3. Navigate around the chart by clicking on the cards within the structure:



4. Use the **Search** to locate a specific person, position, or department:



5. Click **Menu** and click on the Harlow council logo to return to the **Home** screen:



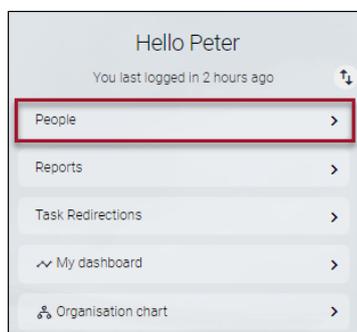
5. The Sections Menu

The menu on the right-hand side of the **Home** screen will contain several sections, the sections; **People**, **Reports** and **Task Redirections** each take you to a different area within MSS where you can complete the required tasks.

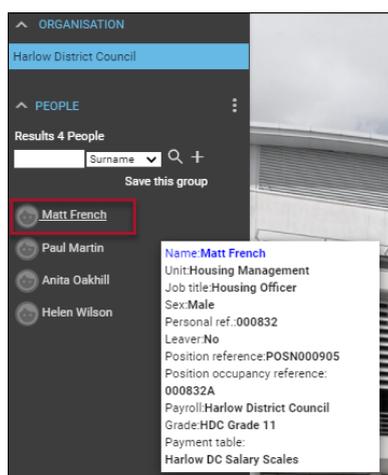
People

The **People** section will allow you to select an employee and view their personal and employment information.

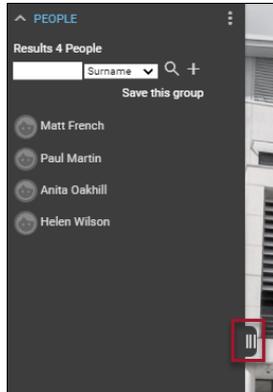
1. Click on the **People** section:



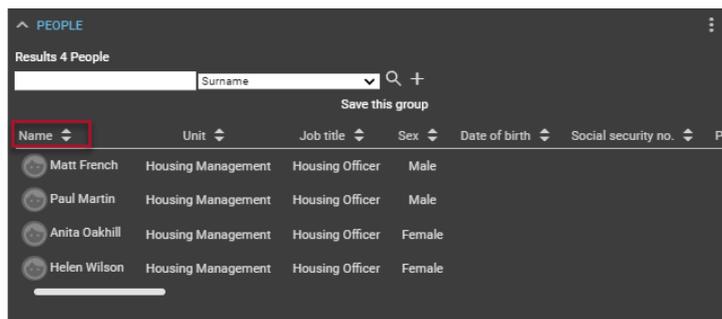
2. Your staff will be listed on the left-hand pane
3. Employees will be listed alphabetically by their surname, and by hovering over the person's name, a pop-up box will appear showing a quick overview of the person's details:



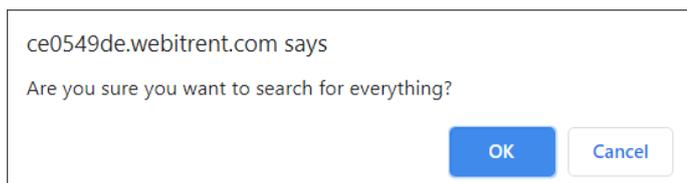
- You can expand the side pain by clicking on the tab to show more information:



- To sort the results into ascending or descending order, click on the column headers, for example the **'Name'** column:

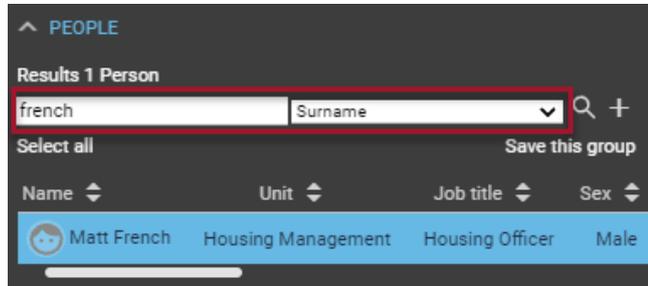


- Click on the tab again to collapse the view
- The default list of employees will only show your first line reporting staff. If you have many employees reporting to you, or you have subsequent levels of reporting staff (you may have staff who also have reporting staff), you may want to use the search function
- Leave the search criteria field blank and press the enter key on your keyboard
- The following message will appear:



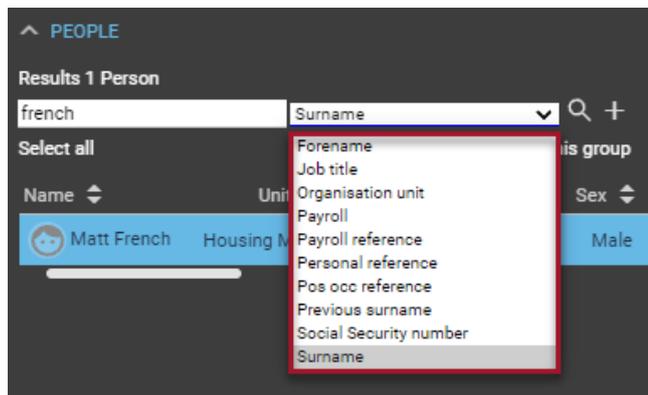
- Click **OK** and a full list of staff will be visible, including yourself

11. Alternatively, you can search for a specific employee by entering their surname and clicking the search icon:



12. The default search criterion is 'Surname'

13. You can select different criteria from the drop-down menu if require:



14. Click on a person's name to select the employee you want to view. Their name will be highlighted, and the **Person Summary** screen will open

Person Summary Screen

Once you have selected the employee you want to view, the **Person Summary** screen will be displayed for that person.

The **Person Summary** screen is split into 4 sections, **Personal**, **Employment**, **Calendar** and **Links**:

Personal

The Personal card shows a summary of the employee's personal details and any notifications such as the employee is within their probationary period or they are due to transfer to another position.

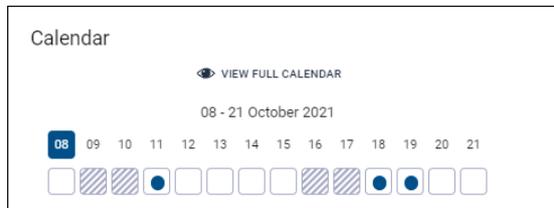
Employment

The Employment card on the summarises the details of the person's current position/s and reporting structure. Clicking on the hours, grade or start date in this section will open the relevant page of information.

To navigate back to the **Person Summary** screen, click in the person's name at the top of the screen.

Calendar

The Calendar card displays the employee's absences for the next 14 days indicated by the blue dots. The shaded days indicate the employee's non-working days:



Annual leave is recorded in hours for all employees and is calculated based on employee grade and pro-rated according to the employee's contractual working hours.

Annual leave total entitlement can include contractual annual leave, statutory bank holidays, and where applicable banked minutes (for Christmas Shutdown), and any approved carry-over of leave from the prior annual leave year pro rated.

Absence gauges show the total hours of holiday entitlement remaining in the current holiday year and the number of sickness days taken in the current year:



1. Click on a gauge to display the relevant information. For example, clicking on the **Holidays Remaining** gauge will display the employee's **Holiday Entitlement Summary page**:

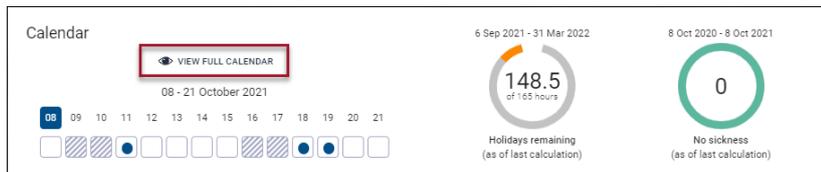
From	To	Duration	Remaining entitlement
22/09/2021	22/09/2021	1	164
22/09/2021	22/09/2021	0.5	163.5
18/10/2021	19/10/2021	15	148.5

This is a 'Read Only page'

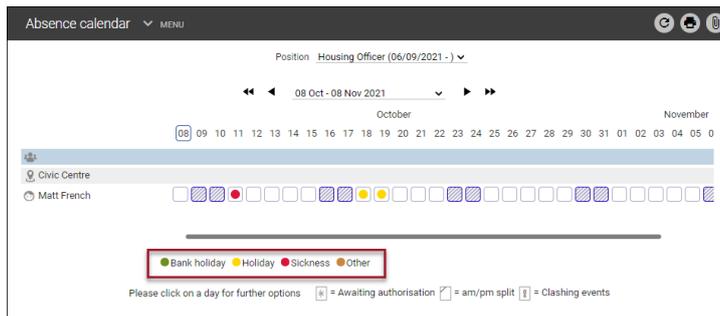
2. Click on the employee's name at the top of the screen to return to the **Person Summary**:



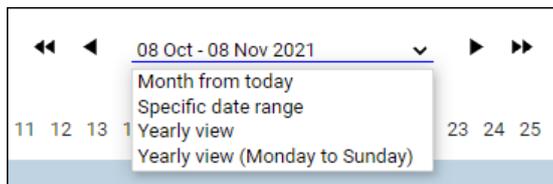
3. Click **View Full Calendar** link to view the person's full calendar:



4. Absences are indicated by the coloured dots as defined in the key at the bottom of the page:



5. Use the left and right arrows to move the calendar forwards or backwards by 1 or 3 months or use the dropdown to select a different view:



6. Further information on using the absence calendar is detailed in the **MSS - Absence** guide.
7. Click on the employee's name at the top of the screen to return to the **Person Summary**:

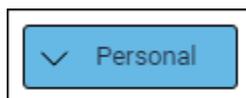


Links

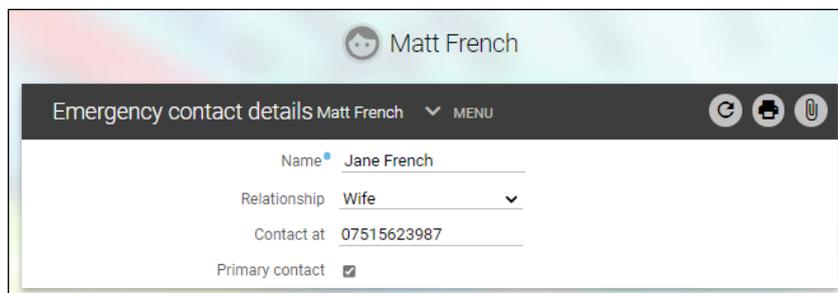
The bottom part of the **Person Summary** screen contains a series of folders and subsequent links. The folders and links will give you access to information for the selected employee.



1. Select a folder to display the links available. The selected folder will display a down arrow to indicate that the folder is open:

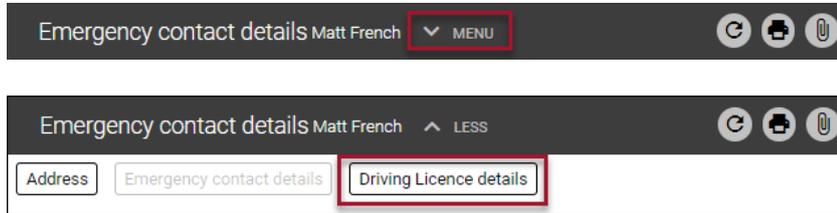


2. Clicking on a link will display the associated page for the selected employee. In this example the link '**Emergency contact details**' is selected, and the **Emergency contact details** page is displayed:

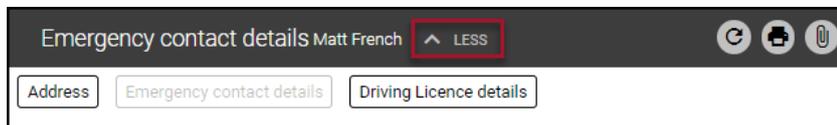


3. Selecting another employee's name from the left-hand pane will keep the current page open but change the displayed information to that of the new selected employee.

- To access other links within the same folder, click on the '**MENU**' option on the page header and select another link:



- This will open the relevant information for the employee selected.
- Selecting '**LESS**' will minimise the menu:



- To navigate; select a different employee, click another link, or click on the employee's name to return to the **Person Summary** screen:



- Select another folder/link to view further details for the employee or select another employee from the left-hand pane.
- Further information on viewing employee personal and employment information is covered in the **MSS – Viewing Personal and Employment Details** guide.
- Click on the Harlow council logo in the left-hand pane to return to the **Home** screen:



New View

While viewing an employee record you may need to navigate to another area of the system or to another page, to prevent you having to navigate away from the current information you are viewing you can use the '**New view**' icon next to the Profile button.



Clicking this option will open another browser window and duplicate the current view, however this window can be navigated independently allowing you to view multiple employee records or multiple pages at the same time.

To close a view, click on the cross within the tab at the top of the screen.



Reports

The Reports section provides access to the management information reports available within MSS.

Reports are covered in the **MSS - Dashboard and reports** guide

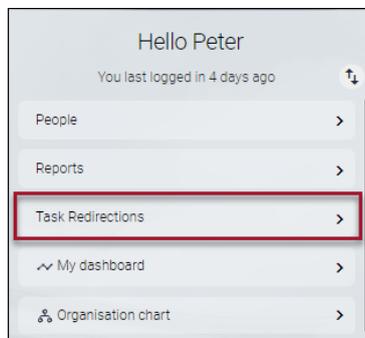
Task Redirections

Tasks will be automatically delivered to your **To do list** for you to action.

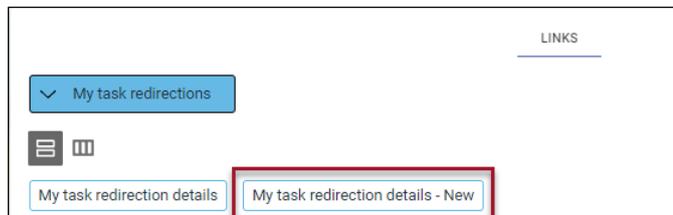
If you will be away from work for a period, e.g. on annual leave, then you will need to redirect your tasks for the duration of your absence. This will enable the task to be actioned by your nominated person and prevent tasks from becoming overdue. Tasks must only be redirected to another Line Manager.

Task Redirection can be accessed from the menu on the **Home** screen.

1. Click on the **'Task Redirections'** section:



2. To add a new task redirection rule, click on the **'My task redirection details – New'** link:



3. The **My task redirection details** page will be displayed:

A screenshot of the 'My task redirection details New' form. The form has a dark header with the title 'My task redirection details New' and a 'MENU' button. Below the header are several input fields: 'Start date' with a calendar icon, 'End date' with a calendar icon, 'Process type' with a dropdown arrow, 'Process' with a search icon, 'Redirect to' with a search icon, and 'Password'.

4. Enter the details of the redirection as required, mandatory fields are indicated by the blue dot next to the field name.
5. **Start Date** - Enter the start date for the redirection.
6. **End Date** – Enter the end date for the redirection. The end date may be left blank if you do not know when you will be returning to work.
7. **Process Type** – Select ‘**Redirect all**’ from the drop-down menu.
8. **Redirect to** - In this field you will search for and select your nominated recipient of your workflow tasks.
9. Click on the search icon and search and select the recipient:

My task redirection details New MENU

Start date 18/10/2021

End date 22/10/2021

Process type Redirect all

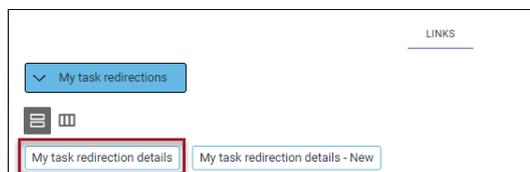
Redirect to MAUREEN.GARDNER

Password

10. Enter your MSS password and click **Save**.
11. Your workflow tasks will be redirected to your nominated Line Manager between the date ranges and will automatically revert to you after the end date.
12. Click on the date at the top of the screen to return to the **My Task Redirection** folder:

18/10/2021

13. To view current or future dated redirections you have in place, select the link ‘**My task redirection details**’ link:



14. Select the redirection date from the left-hand pane.
15. The redirection dates or recipient may be amended, or the redirection deleted if no longer required.
16. Click on the date at the top of the screen to return to the ‘**My Task Redirection**’ folder or click the Harlow council logo in the left-hand pane to return to the **Home** screen.

6. The Profile Button

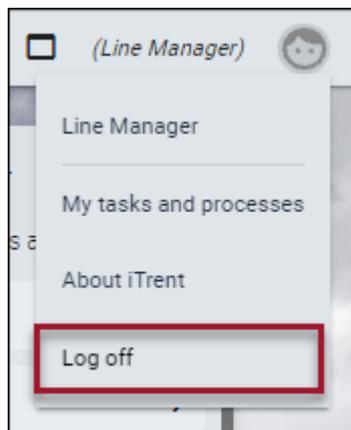
The **Profile** button is situated on the top right-hand side of MSS.



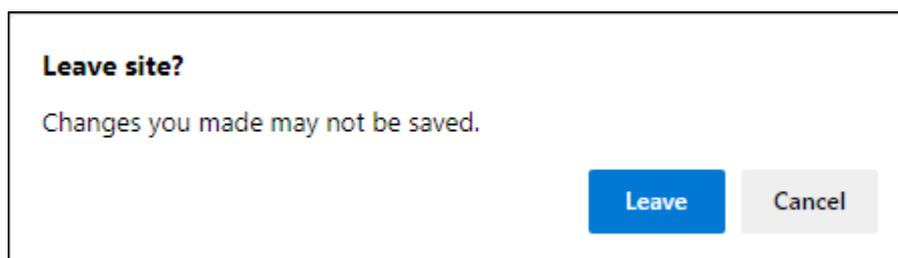
The **Profile** button remains available throughout MSS regardless of the page or information you are viewing and provides quick access to your **'To do list'** and provides the option to log out of MSS.

Logging Out

1. Click on the **'Profile'** button and select **'Log off'**:



2. The following pop-up will be displayed:



3. Click **'Leave'** to Log off or **'Cancel'** to remain in MSS.