NEW ESS GUIDANCE

Itrent

South Cambridgeshire District Council

Last updated 18th March 2022

New ESS guidance

The Contents is interactive and will link you to the page you require.

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Logging in

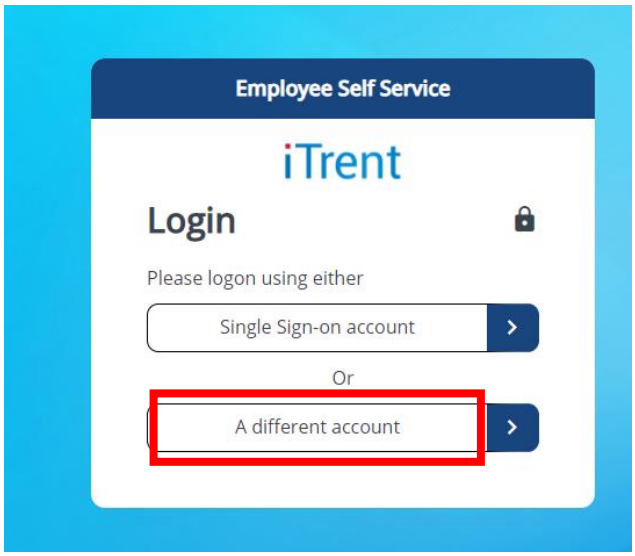
Logging in – SSO Landing page vs Non SSO

SSO

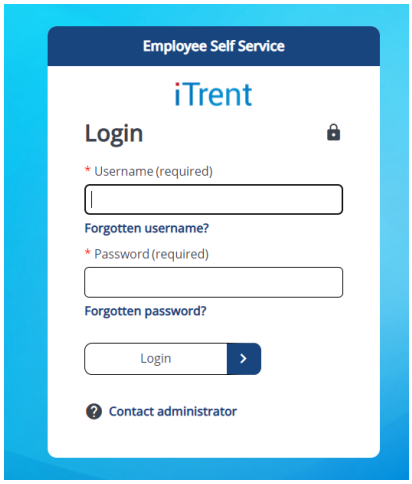
As before, the link will log you straight in.

Non- SSO

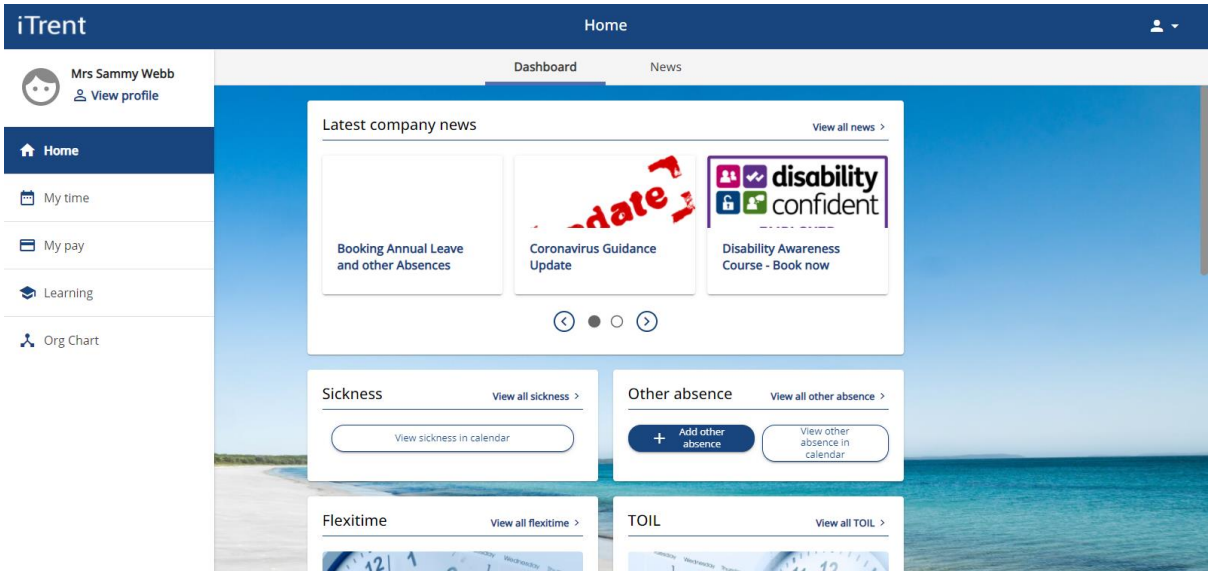
Select ‘A different account’



Then as before, enter your Username (either your personal reference number or email address your account is setup with) and password.

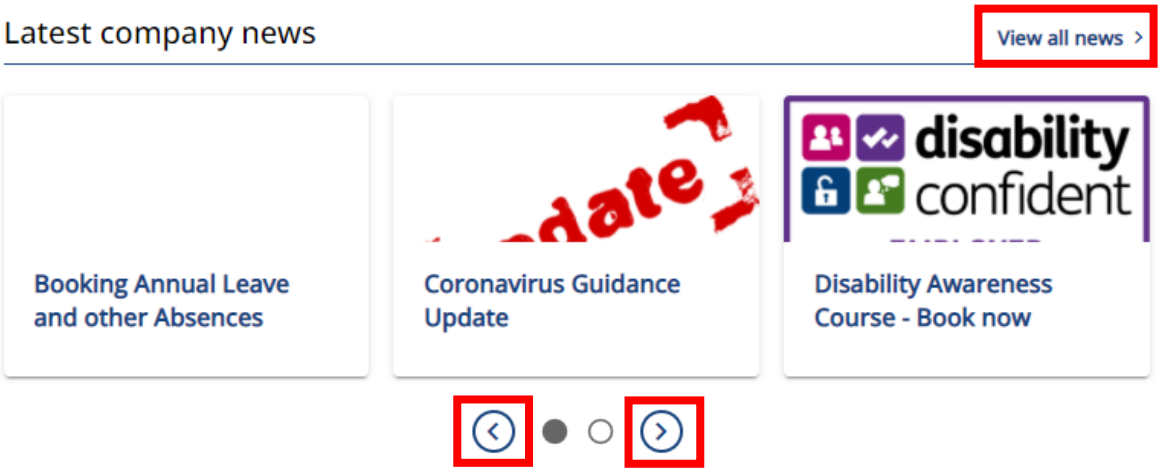


New Homepage Layout

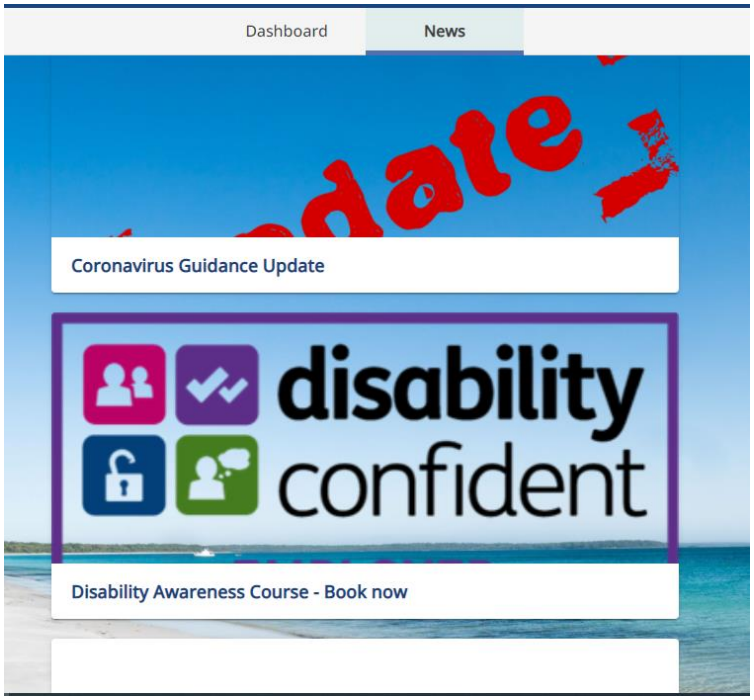


New layout and navigation.

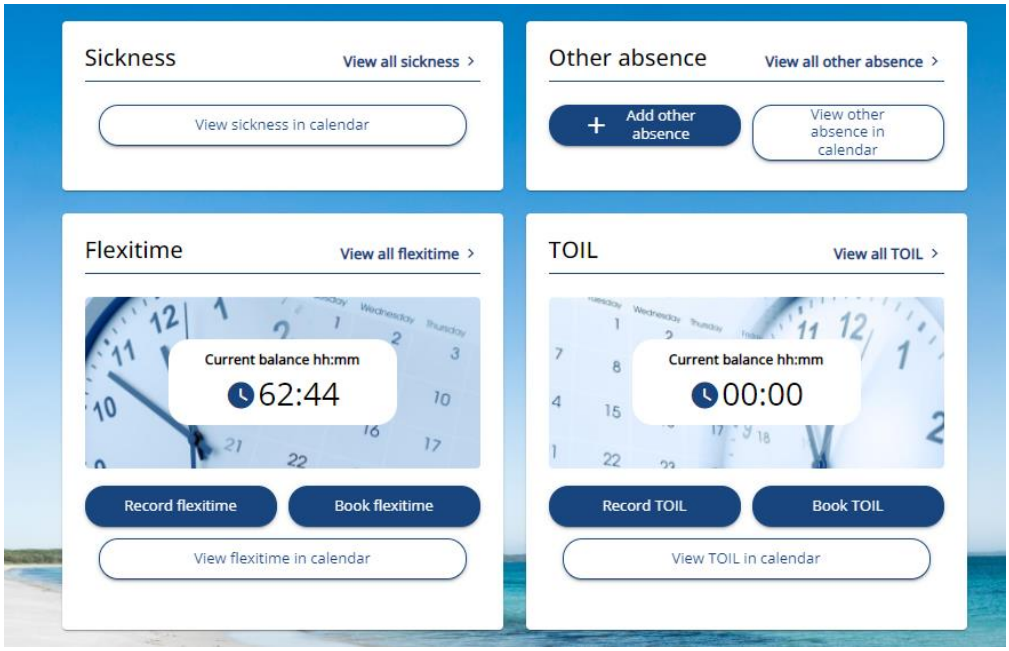
The carousel items are now listed as ‘News’ at the top. You can toggle across using the arrows to see the top stories, or to take you to the News tab click on ‘view all news’:

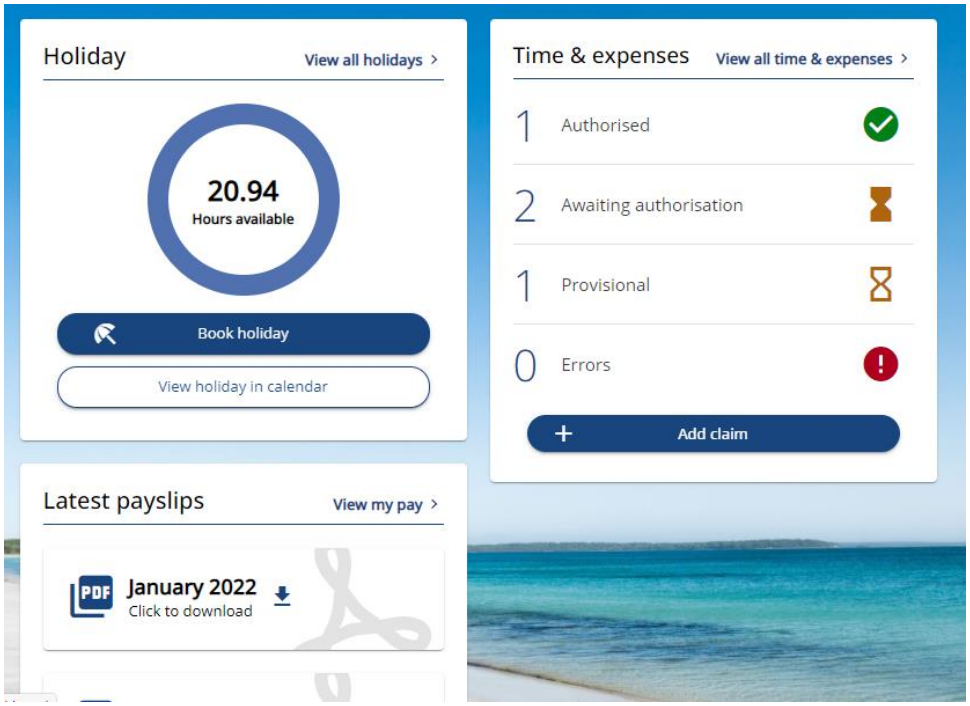


The news tab shows all the news items and you can scroll down to see each one:



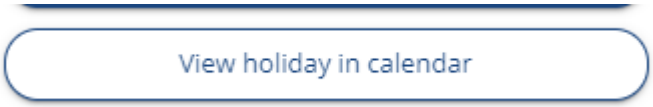
The homepage also includes absence summaries and pay related summaries:



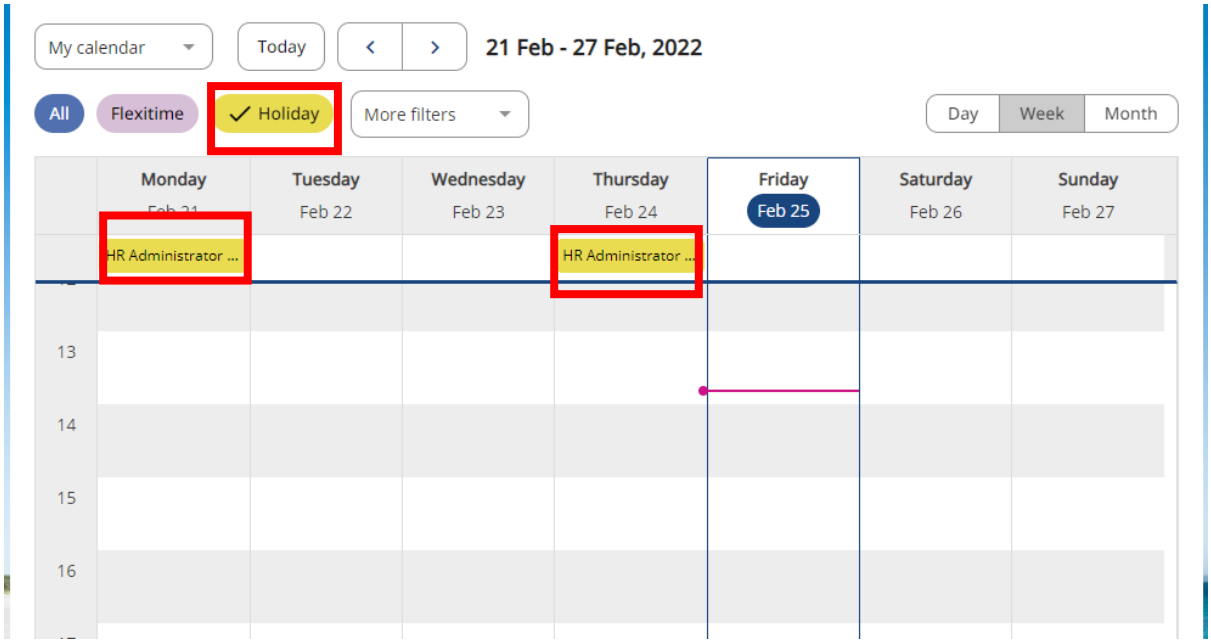


Calendar filters

You will notice each absence item has the option to view in the calendar e.g.

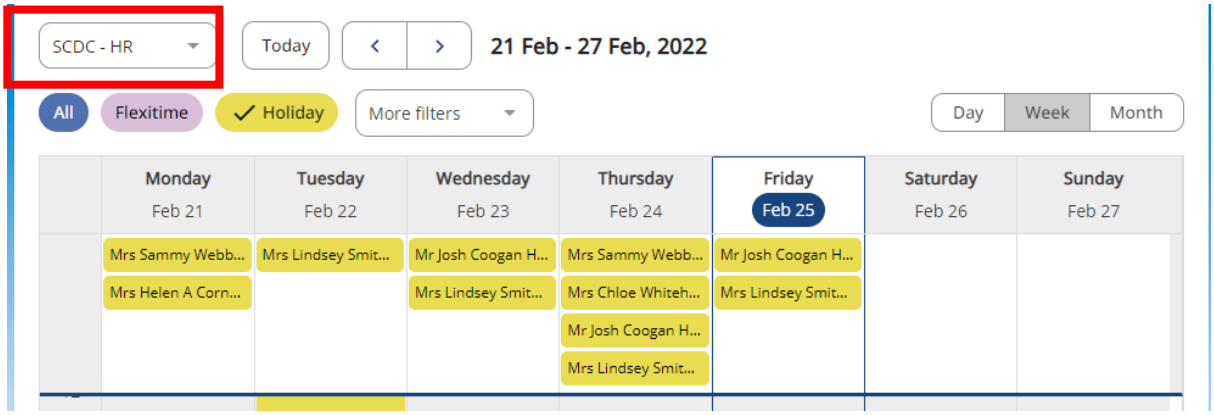


Clicking on these will open the calendar and apply a filter based on the type of absence you asked to see in the calendar. For instance, viewing holidays in the calendar:

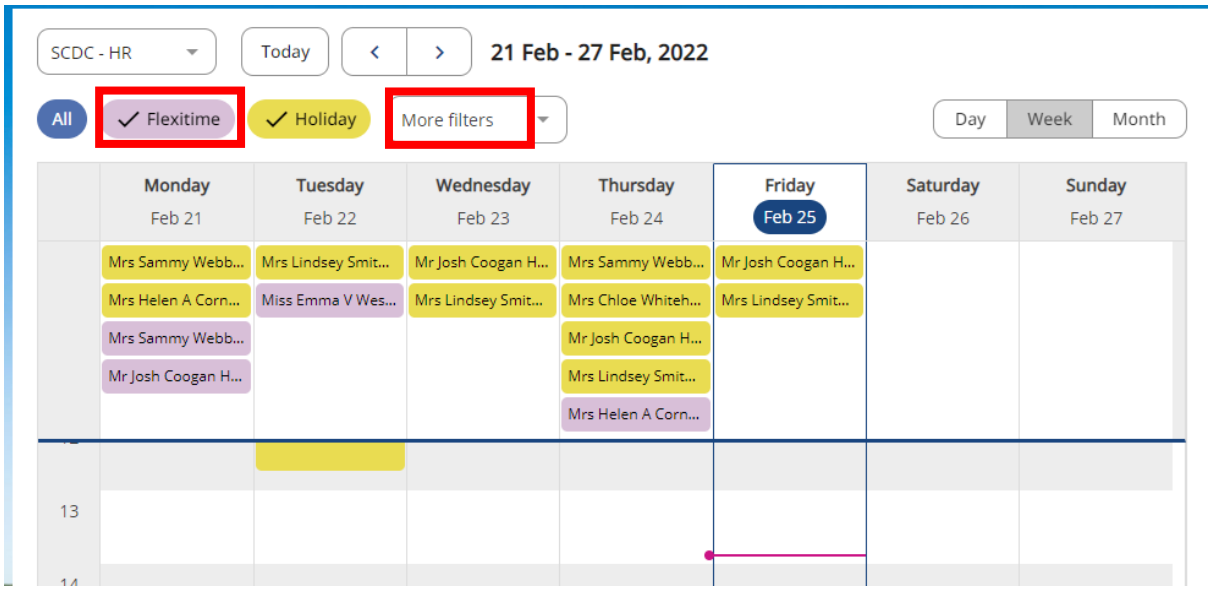


Only the holiday filter is highlighted, and holiday absences are the only thing visible in the calendar.

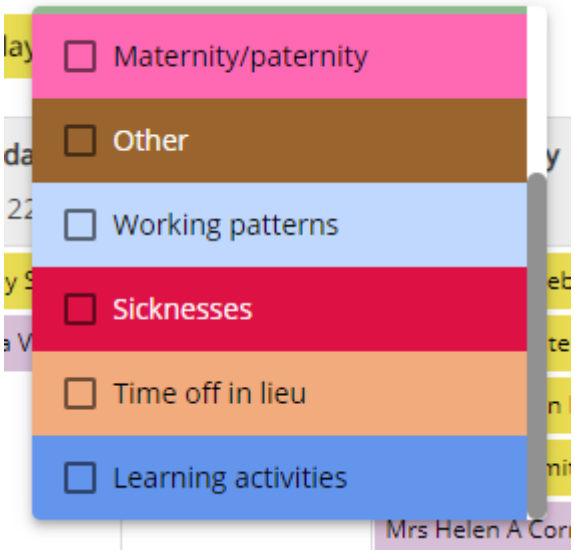
If you are part of a peer group (this is setup by managers) you can select to switch to your team calendar, whilst still seeing only the holiday filter applied:



Within the calendar you can also apply other filters to view other absence types, working patterns or learning activities:



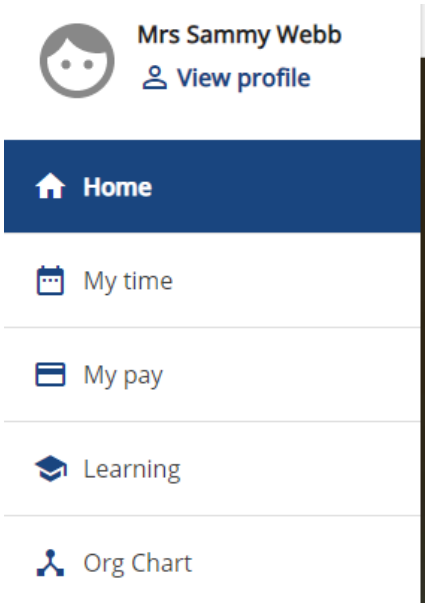
Clicking on more filters shows these other options to apply:



To come out of the calendar, either click on

Or the iTrent logo will take you back to the homepage.

The tabs that used to appear across the top of the page are now down the side:



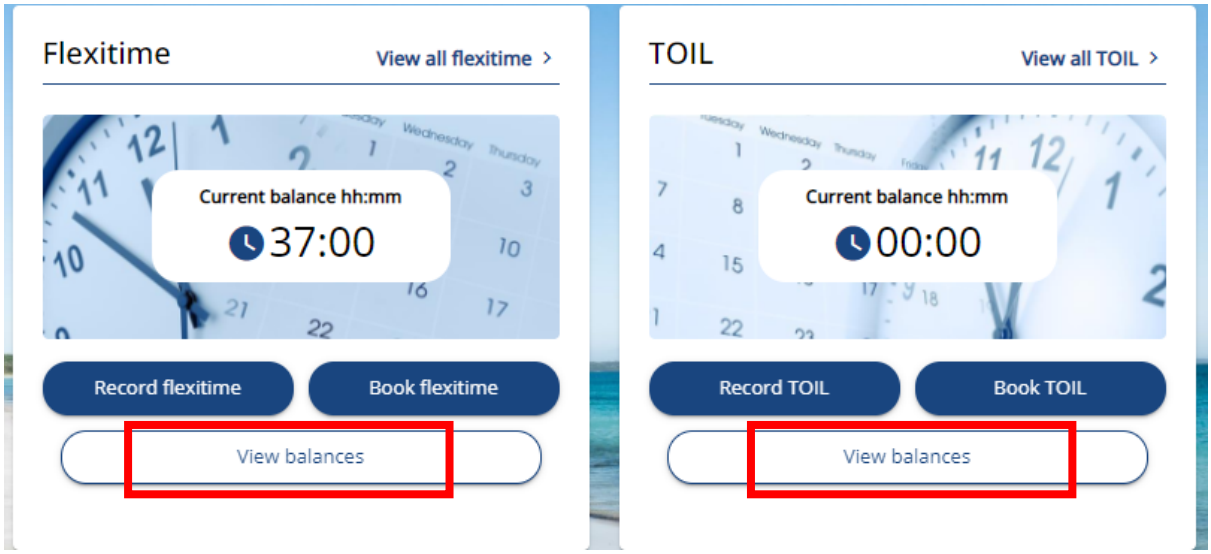
My time

You will notice the names for each are slightly different, and the personal and Employment tabs are not visible here.

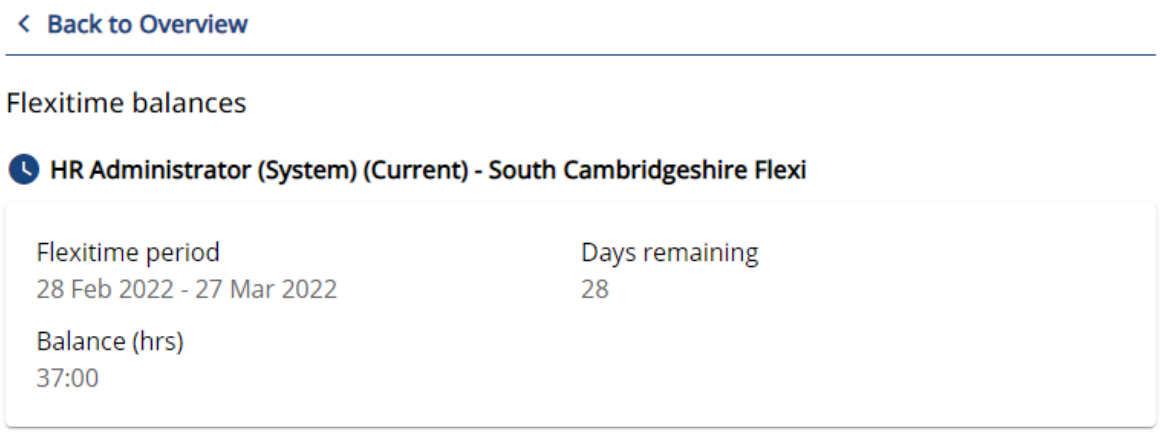
This was formerly the ‘Absence’ Tab. This includes absence and Flexi details.

This has information similar to the homepage, but there are a couple of additional features.

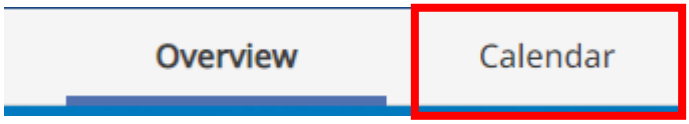
One tab only available on ‘My Time’ is the ‘View balances’ tab for Flexi and Toil:



This is where you can find further information of the current flexi period:



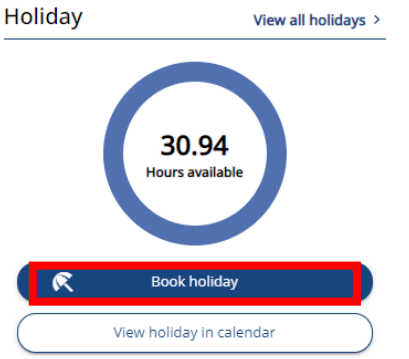
Also, from the available tabs you are able to go straight to the calendar:



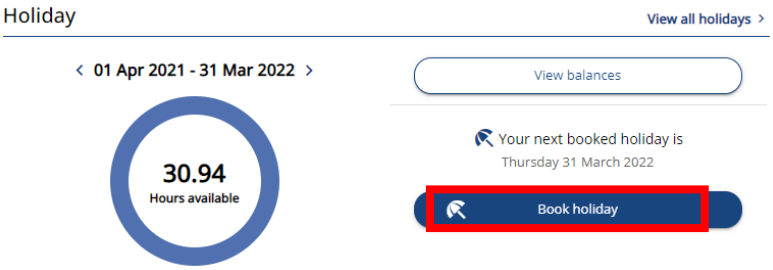
Booking a Holiday

When booking a holiday this can be completed either via the Holiday tab on the homepage or via the ‘My Time Tab’

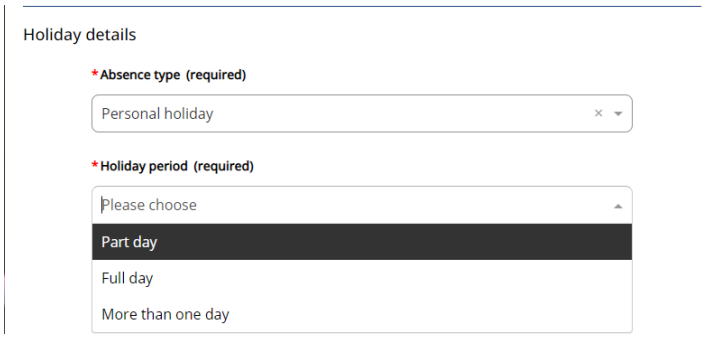
Homepage:



My time:

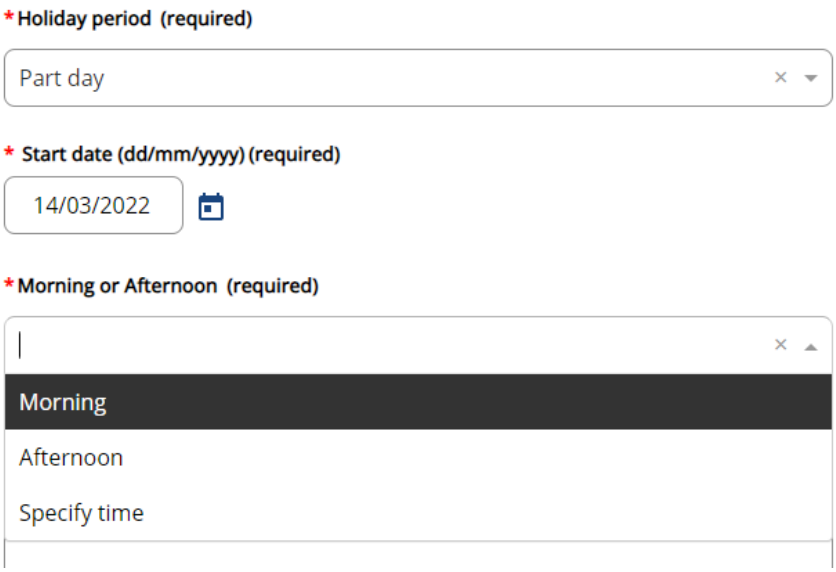


As before select the holiday period from the list, either Part day, Full day, or more than one day:

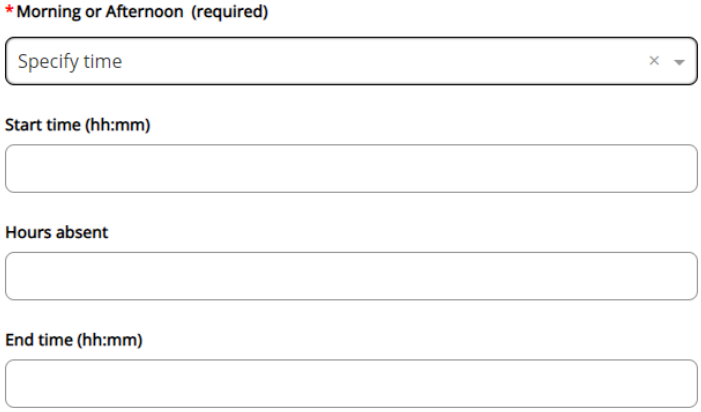


For a Full day, only one date field needs to be entered:

For a Part day you can specify in detail whether it will be Morning, Afternoon or specific timings on the date requested:

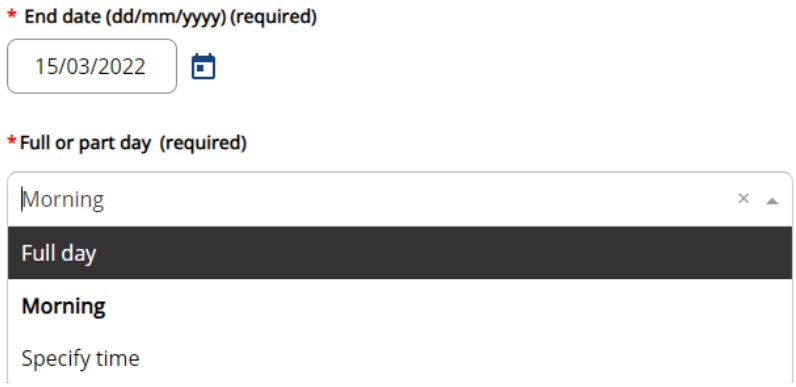


For Specify time, you need to enter the start and end time as well as the total hours absent (in the middle box, written as hours and minutes):

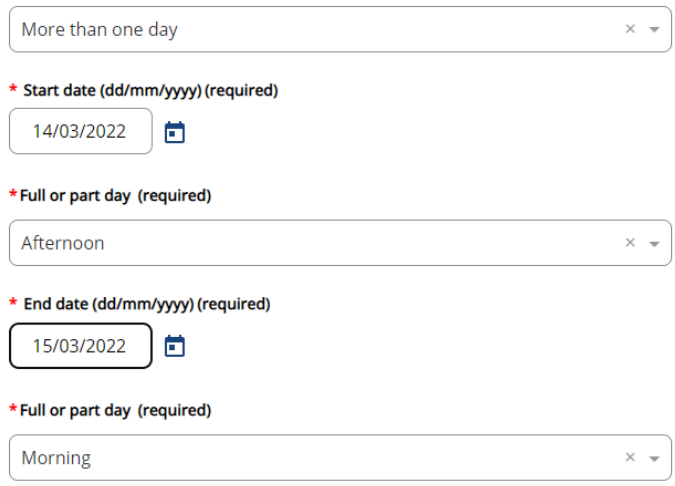


e.g.

For more than one day, you will be able to as with the part day, specify in detail whether it will be Morning, Afternoon or specific timings at the start but also the end date of the absence (completed in the same way as the above example for both start and end date):



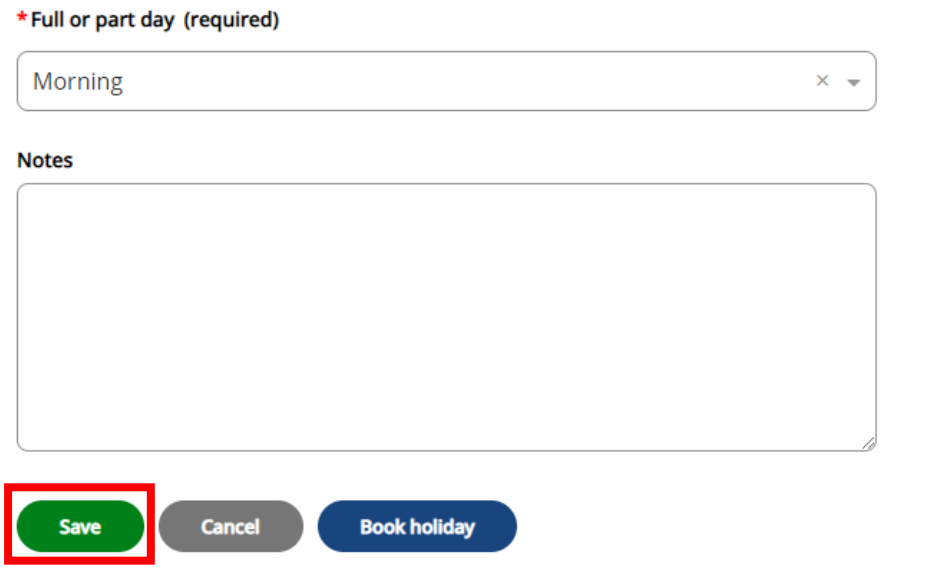
e.g.



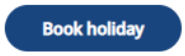
If you only have one position, the position field will auto-populate once a start date and time has been entered. If you have more than one position however, you will need to select from the dropdown list which role the holiday booking relates to (based on your working pattern setup):

As before, if applicable you can add any notes in the box at the bottom.

To submit the holiday, please click on 'Save' the same as before:



The Book holiday button will take you to book a new absence on a blank template.

If you require to book further holiday, rather than returning to the overview, you can use the 

button to continue a new request.

If you are finished with making any holiday requests, you can return to the page you were on previously either -

takes you back to 'My Time' or

takes you back to the homepage (otherwise known as the 'Dashboard').

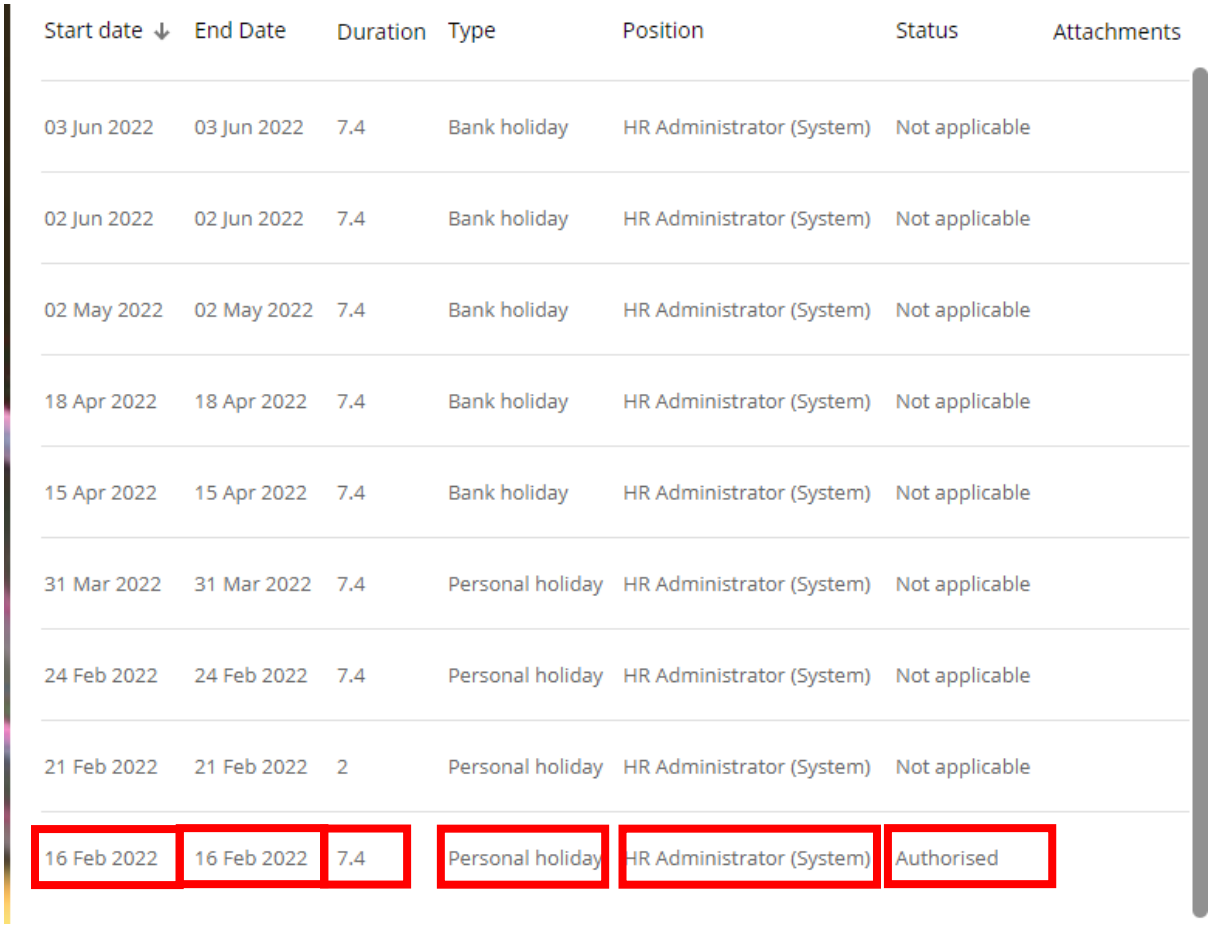
The other option is to click on the

logo, which also takes you back to the homepage.

Amend/Cancel holiday

To Amend or cancel a future holiday booking, you need to open the holiday record via

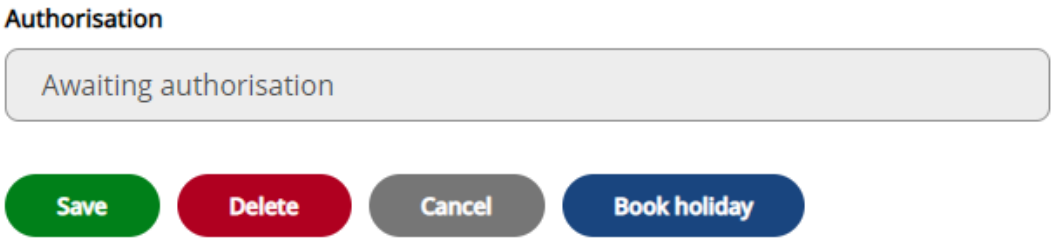
to bring up the list of holidays (which includes bank holidays) and select the relevant record from the list by clicking on any of the information in the row:



Start date ↓	End Date	Duration	Type	Position	Status	Attachments
03 Jun 2022	03 Jun 2022	7.4	Bank holiday	HR Administrator (System)	Not applicable	
02 Jun 2022	02 Jun 2022	7.4	Bank holiday	HR Administrator (System)	Not applicable	
02 May 2022	02 May 2022	7.4	Bank holiday	HR Administrator (System)	Not applicable	
18 Apr 2022	18 Apr 2022	7.4	Bank holiday	HR Administrator (System)	Not applicable	
15 Apr 2022	15 Apr 2022	7.4	Bank holiday	HR Administrator (System)	Not applicable	
31 Mar 2022	31 Mar 2022	7.4	Personal holiday	HR Administrator (System)	Not applicable	
24 Feb 2022	24 Feb 2022	7.4	Personal holiday	HR Administrator (System)	Not applicable	
21 Feb 2022	21 Feb 2022	2	Personal holiday	HR Administrator (System)	Not applicable	
16 Feb 2022	16 Feb 2022	7.4	Personal holiday	HR Administrator (System)	Authorised	

When the record has opened, to amend simply amend any details in the record, then scroll to the bottom and click Save . To cancel, scroll straight to the bottom and click Delete . The **cancel button** will just simply cancel any amendments you have not saved on the template, or take you out of the record.

You should be able to delete a booking whether it is awaiting authorisation or has been authorised:



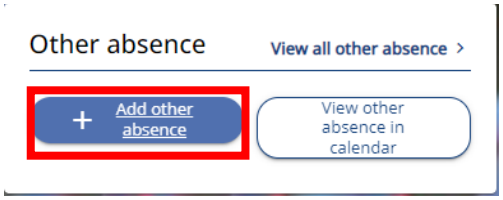
To exit from a record, click < Back to Absence records then

< Back to Overview .

Other Absences

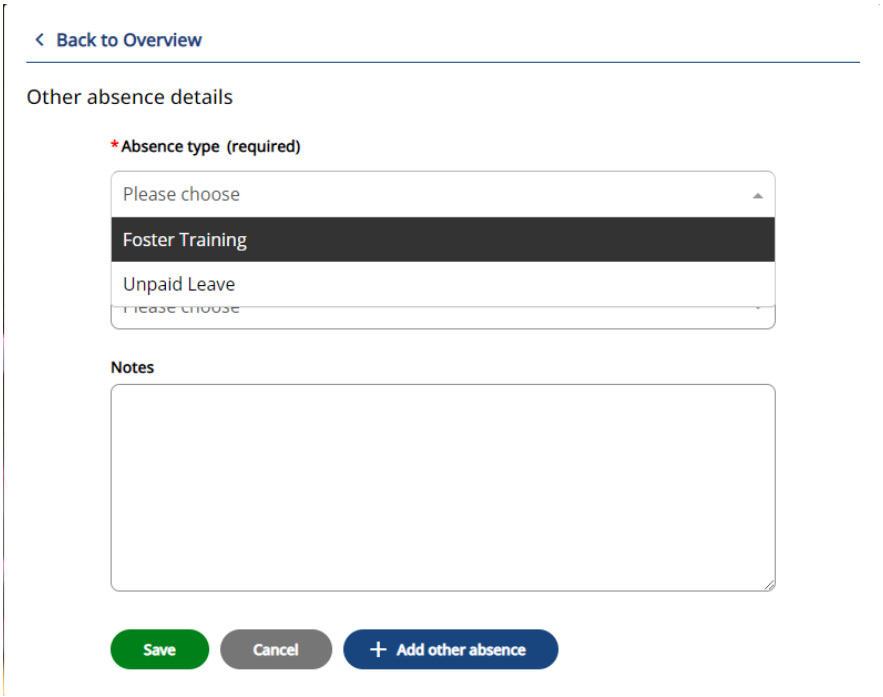
Adding an ‘other absence’, works in the same way as booking holiday.

To book use the tab which is available on both the homepage or My time, and click on ‘+Add other absence’:

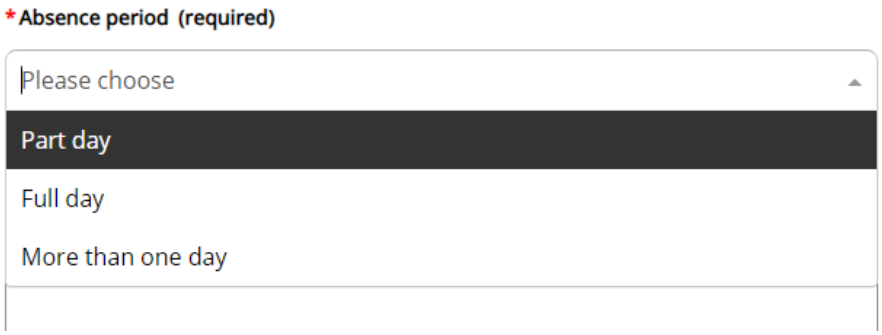


Other absences currently available to record in the system are Foster Training and Unpaid Leave. Other types of absences are being reconfigured and will be made available as soon as possible. For now, for Paid absences (such as antenatal appointments, Jury Service and Study days) please communicate with your manager and enter a flexi record, including in the notes the absence reason during that day. Managers please monitor that employees do not exceed any entitlement for leave such as only up to 5 study days may be taken for a course that has a training

agreement in place. For leave that is unpaid (including parental, dependants and special dependants leave), use the Unpaid leave option.

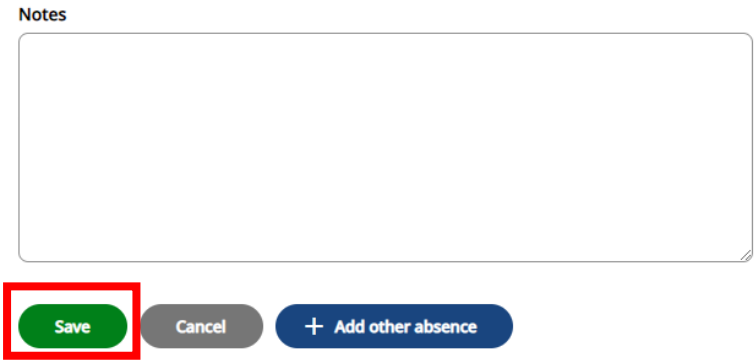


Absence periods available to select are the same as holiday - Part day, Full day or More than one day:



If you only have one position, the position field will auto-populate once a start date and time has been entered. If you have more than one position however, you will need to select from the dropdown list which role the other absence relates to (based on your working pattern).

Again, **to submit the other absence, please click on 'Save'** the same as before.



The + Add other absence button will take you to book a new absence on a blank template.

If you require to book another other absence, rather than returning to the overview, you can use the button to continue a new request.

For compassionate leave, managers need to enter this in manager Self-Service – still under 'other absences.'

If you are finished with making any holiday requests, you can return to the page you were on previously either - takes you back to 'My Time' or

< Back to Dashboard takes you back to the homepage (otherwise known as the 'Dashboard').

The other option is to click on the iTrent logo, which also takes you back to the homepage.

Amend/Cancel other absence

To amend or cancel a future holiday booking, you need to open the other absence record via View all other absence > to bring up the list of other absences and select the relevant record from the list by clicking on any of the information in the row:

Start date ↓	End Date	Duration	Type	Position	Status	Attachments
11 Apr 2022	13 Apr 2022		Foster Training	HR Administrator (System)	Authorised	
08 Apr 2022	08 Apr 2022		Foster Training	HR Administrator (System)	Authorised	
18 Mar 2022	18 Mar 2022		Unpaid Leave	HR Administrator (System)	Awaiting authorisation	
01 Mar 2022	01 Mar 2022		Compassionate Leave (NSA)	HR Administrator (System)	Not applicable	

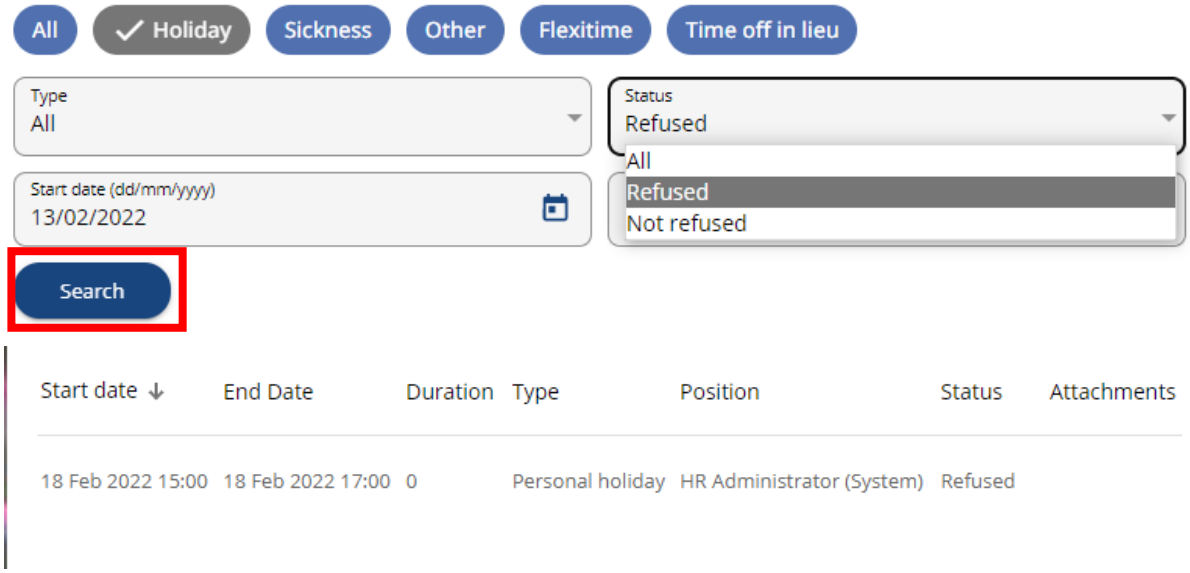
When the record has opened, to amend simply amend any details in the record, then scroll to the bottom and click Save. To cancel, scroll straight to the bottom and click Delete. The **cancel button** will just simply cancel any amendments you have not saved on the template, or take you out of the record.

To exit from a record, click < Back to Absence records then < Back to Overview .

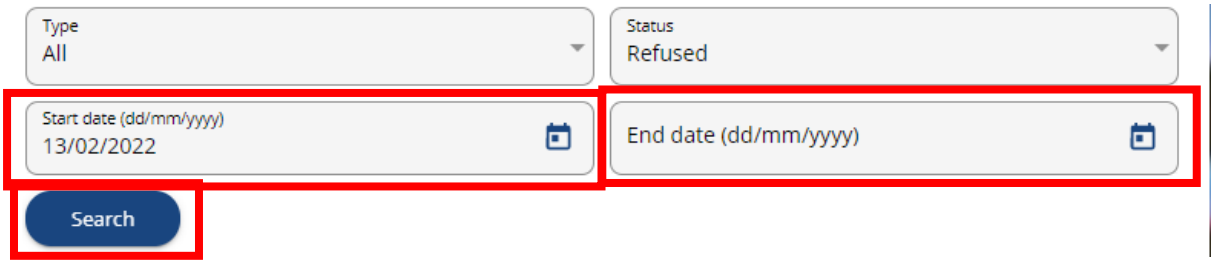
Status of holiday/Other absence

Not applicable - relates to holiday/other absence entered in the core system, this includes bank holidays or any holiday that has been entered by your manager.
Authorised – The holiday/other absence has been authorised by your manager
Awaiting Authorisation – Your manager is yet to approve the holiday/other absence request
Refused – The holiday/other absence has been refused

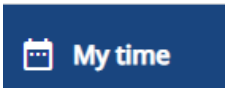
You can use the filter at the top to view any refused holiday bookings or change to view all (refused and not refused) and click search to apply:



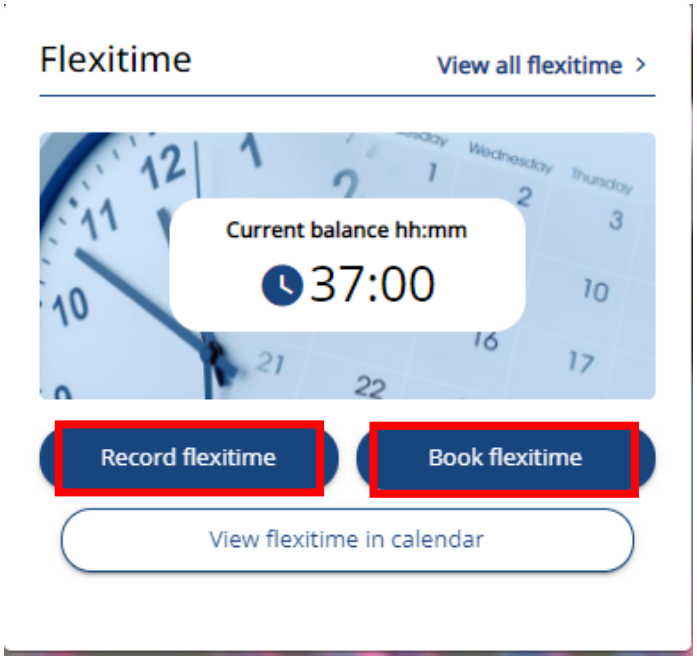
You can also amend the date periods you wish to view using the date filters



Flexi

Flexi is accessible via both the homepage and 

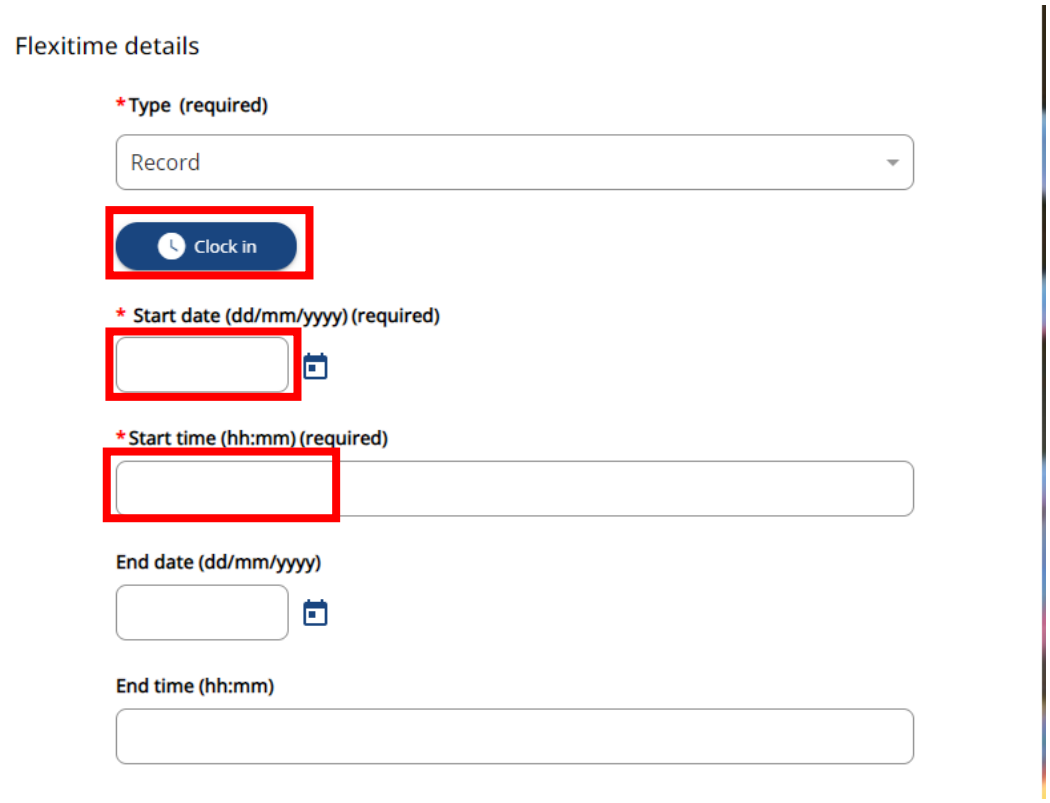
tab. The balance is displayed within the Flexitime widget. You now have the button options to ‘Record flexitime’ or ‘Book Flexitime’, and this will open the required template:



Record Flexi

To record flexi, click on ‘Record flexitime’ (as shown above), and fill in the template as before.

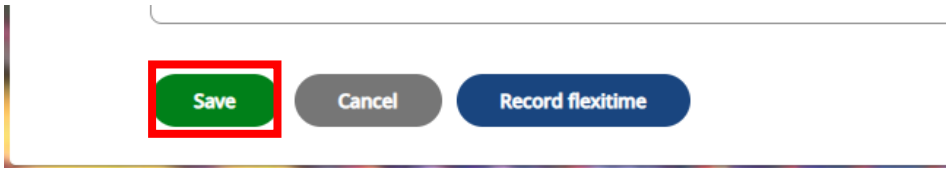
There is still a ‘clock in’ and later a ‘clock-out’ option that will auto-fill in the dates and times, or you can enter manually:



If you only have one position, the position field will auto-populate once a start date and time has been entered. If you have more than one position however, you will need to select from the dropdown list which role the hours recorded relate to.

The notes field, as mentioned previously, can be used to enter details of an 'other absence' which is paid, such as antenatal appointments that occur during the day.

When you have entered your start time, go to the bottom and 'SAVE' the flexi record.

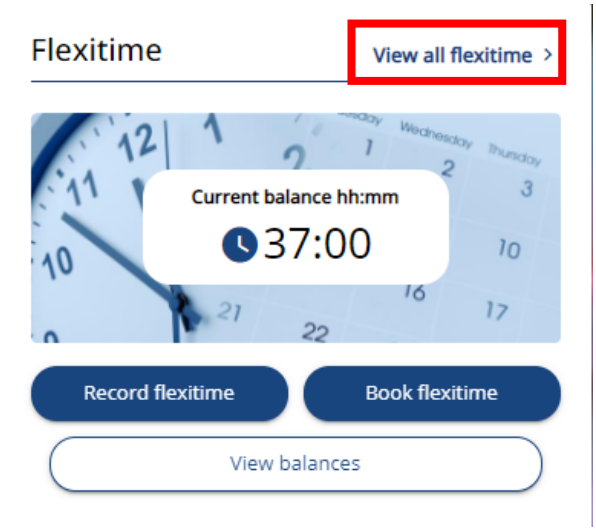


The Record flexitime button will take you to a new record blank template.

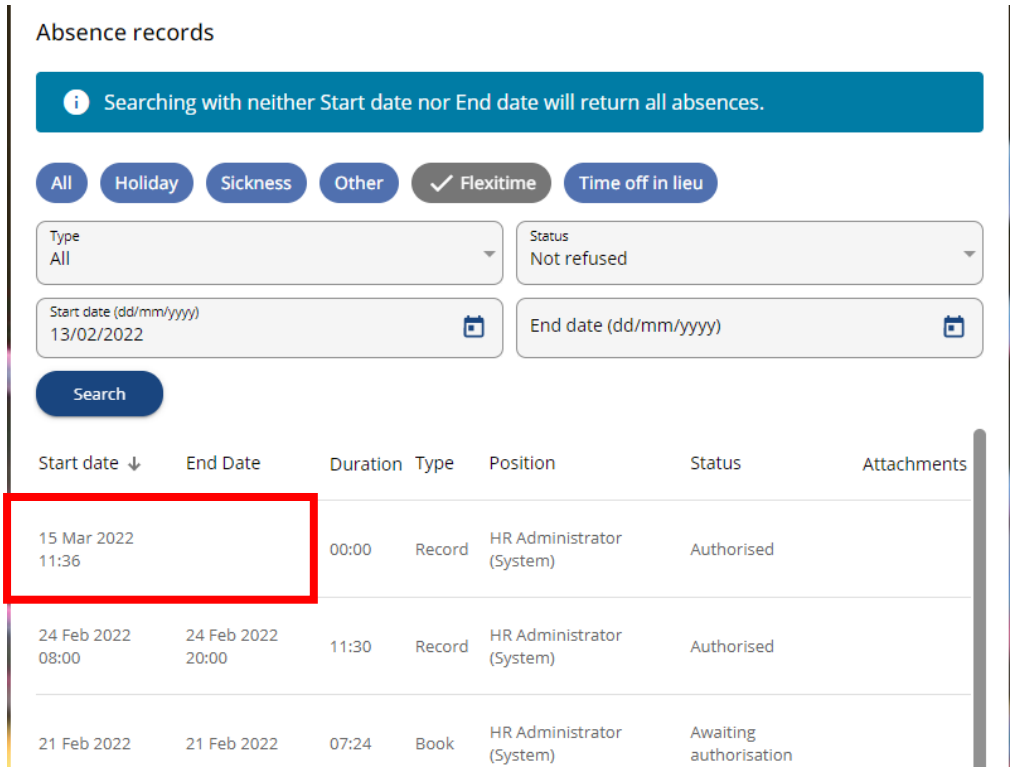
If you are finished with making any holiday requests, you can return to the page you were on previously either - < Back to Overview takes you back to 'My Time' or < Back to Dashboard takes you back to the homepage (otherwise known as the 'Dashboard').

The other option is to click on the iTrent logo, which also takes you back to the homepage.

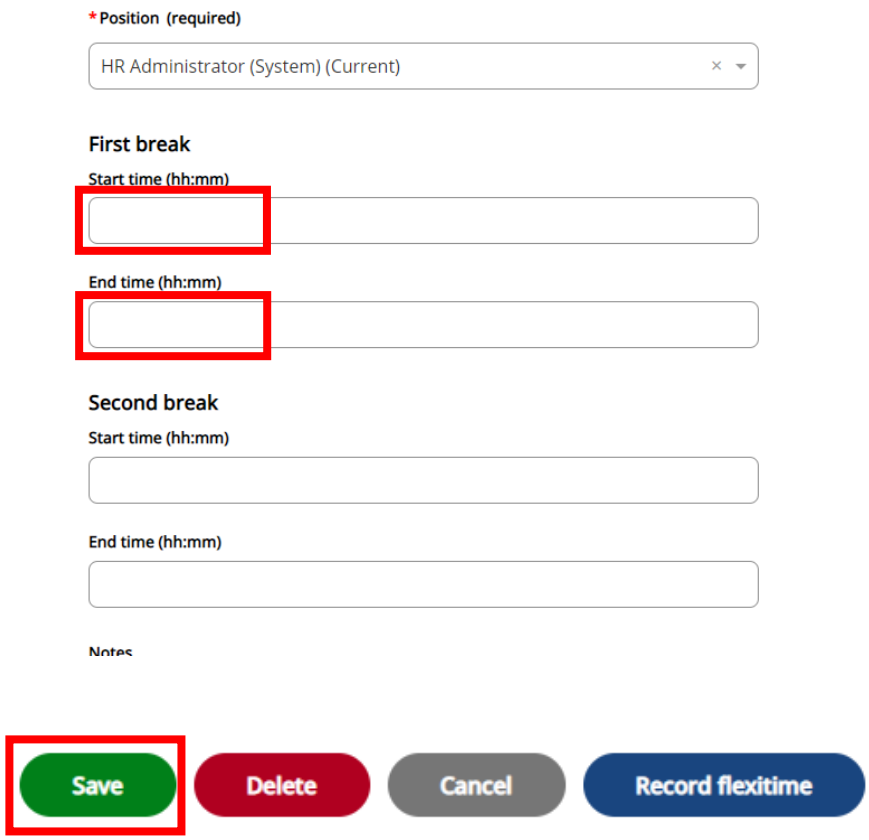
You can return to the record later to add your break times and then your end time, by this time clicking on 'view all flexitime'



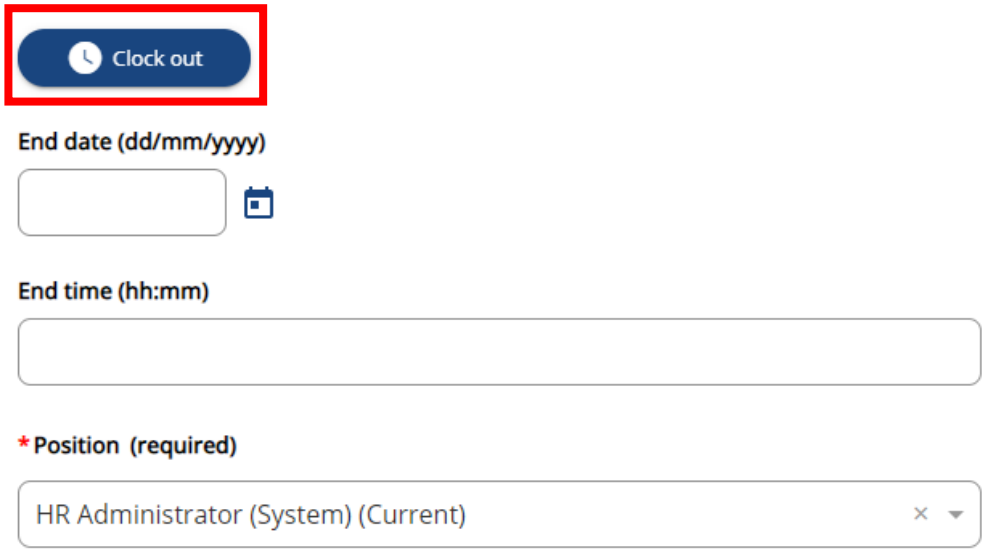
Open the record that needs to be amended, by clicking on the start date of the record:



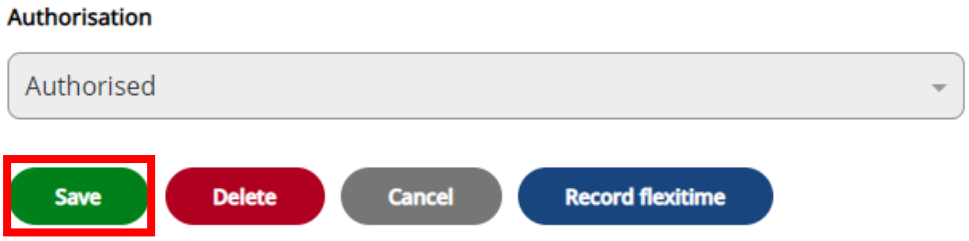
This will open the record. Scroll down to enter your break times (this needs to be typed in) and then click the ‘SAVE’ button at the bottom:



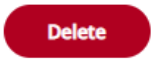
At the end of the day, access the record as above. You can then ‘clock-out’ using the button, or enter your end date and times manually by typing them in:



Then again, click ‘Save’ to save the details added:



If you have missed entering your record for the day, you can enter your start, break times and end times in one go, before saving.

Flexitime records are automatically authorised. If you need to **delete a record**, for instance you have accidentally entered the same date twice, you can open the record (as detailed above) and simply click 

. The **cancel button** will just simply cancel any amendments you have not saved on the template, or take you out of the record.

The other way to leave the flexi record is by clicking the

at the top or clicking the

logo will return you to the homepage.

Book Flexi

To Book Flexi, click on the

button.

Enter the date/s required for the flexi booking (up to two days in a four week flexi period can be taken) and whether it is half a day or a full day:

Again, if you only have one position, the position field will auto-populate once the date/s and length of booking has been entered. If you have more than one position however, you will need to select from the dropdown list which role the booking relates to. (Please make sure you select the role that the booking affects based on your working patterns, so that the booking is deducted from the correct balance and the request is sent to the correct manager to authorise):

When you have entered the booking details, go to the bottom and ‘SAVE’ the flexi booking to submit to your manager for authorisation.

The Book flexitime button will take you to a new flexi booking blank template.

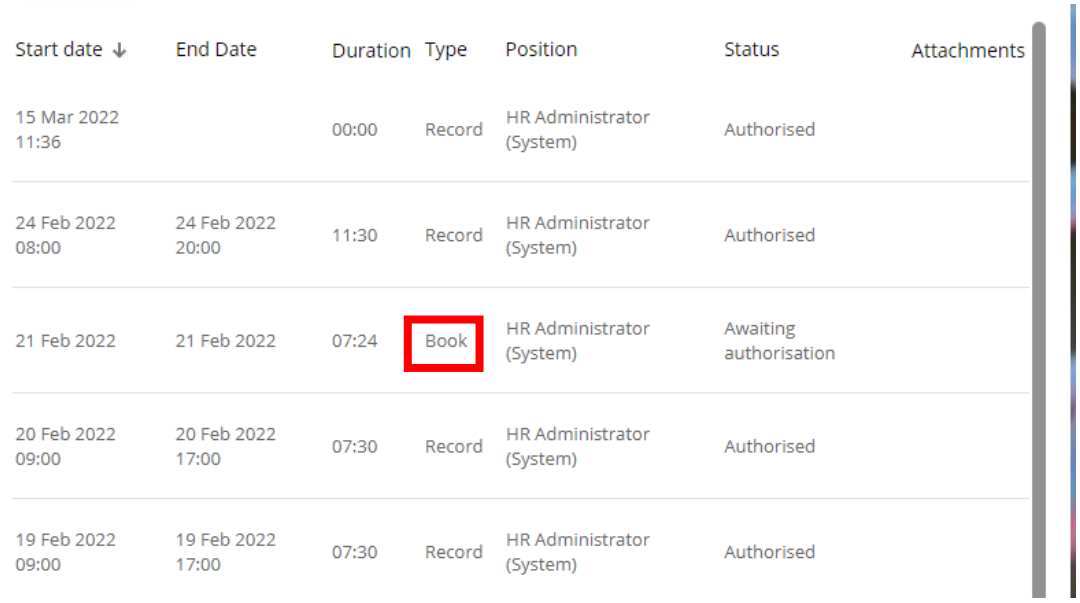
If you require to book another Flexi booking, rather than returning to the overview, you can use the Book flexitime button to continue a new request.

If you are finished with making any Flexi booking requests, you can return to the page you were on previously either - < Back to Overview takes you back to 'My Time' or < Back to Dashboard takes you back to the homepage (otherwise known as the 'Dashboard').

The other option is to click on the iTrent logo, which also takes you back to the homepage.

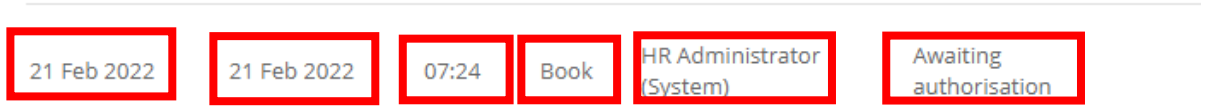
Amend/Cancel Flexi

If you need to amend or **cancel a Flexi booking**, simply open the booking record via View all flexitime >, locate the date of the flexi booking in the list (the type will specify 'Book'):



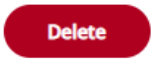
Start date ↓	End Date	Duration	Type	Position	Status	Attachments
15 Mar 2022 11:36		00:00	Record	HR Administrator (System)	Authorised	
24 Feb 2022 08:00	24 Feb 2022 20:00	11:30	Record	HR Administrator (System)	Authorised	
21 Feb 2022	21 Feb 2022	07:24	Book	HR Administrator (System)	Awaiting authorisation	
20 Feb 2022 09:00	20 Feb 2022 17:00	07:30	Record	HR Administrator (System)	Authorised	
19 Feb 2022 09:00	19 Feb 2022 17:00	07:30	Record	HR Administrator (System)	Authorised	

Click on any of the information in this row to open the record:



To amend, make any necessary changes and then scroll to the bottom and click

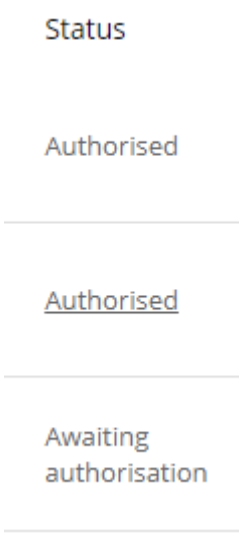
. To cancel, scroll straight to the bottom of the record and click



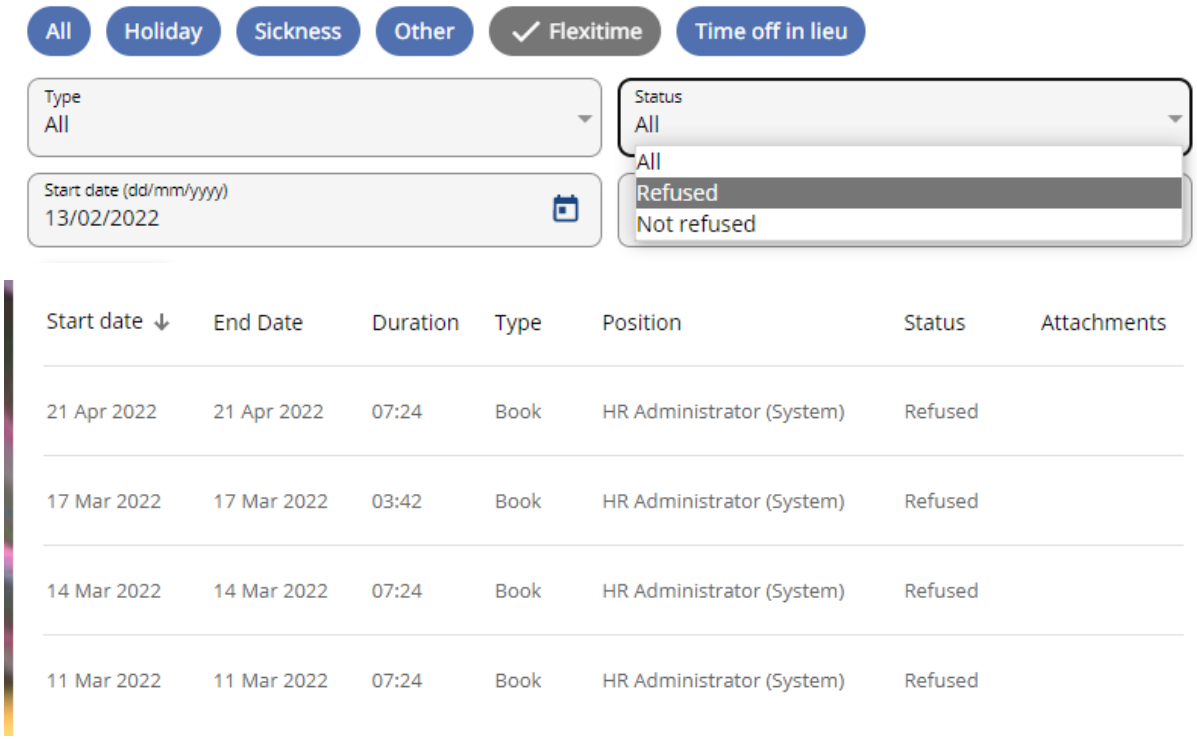
. The **cancel button** will just simply cancel any amendments you have not saved on the template, or take you out of the record.

Status of Flexi

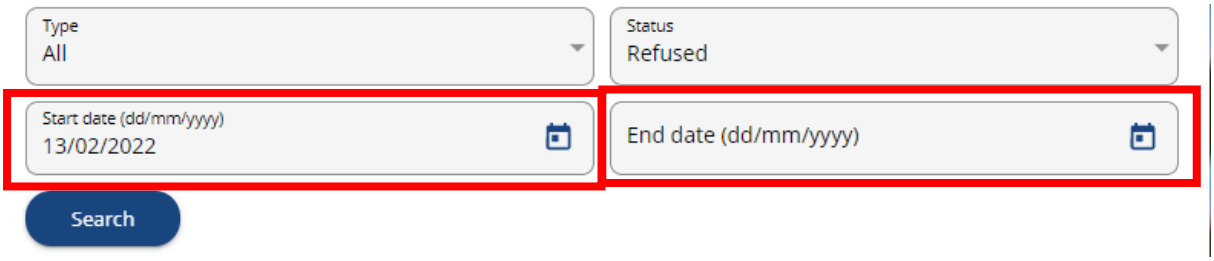
The status is setup automatically as ‘Not refused’ and you will see all the records and bookings that are either ‘Authorised’ or ‘awaiting authorisation’:



You can use the filter at the top to view any refused flexi bookings or change to view all (refused and not refused):



You can also amend the date periods you wish to view using the date filters:



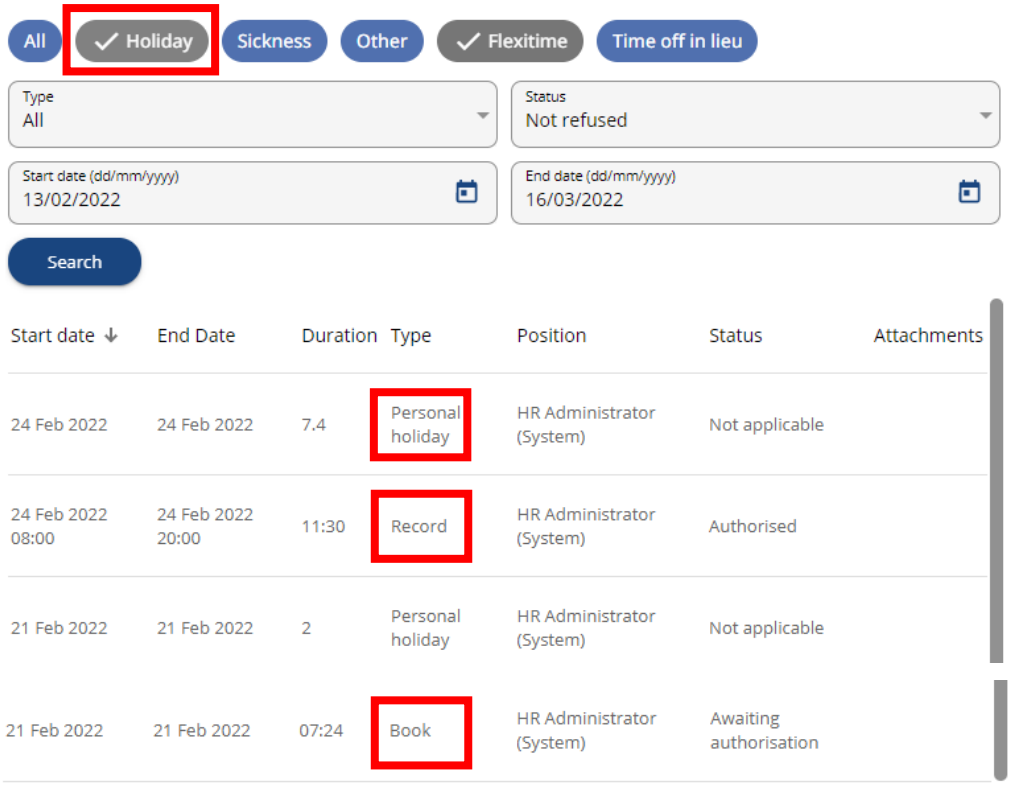
However, please note that if a record has not been end dated, this will not display in a date filter. When adding end times for a record you are best to open the 'view all flexitime' and not make any amendments to the filters.

Viewing all absence types

When viewing holiday, other absence, flexi etc., you will notice at the top of the page there are filters available so that you are able to view all the different types of absences in a list together.

You simply need to click on the button for the required absence type to populate the list with relevant records. E.g.:

Accessing from the 'view all flexitime', I have also selected holiday:



The types listed now show Personal holiday (holiday request), Record (flexi record) and Book (Flexi Booking).

Types Key

Personal holiday Holiday bookings

Record Flexi Record

Book Flexi Booking/Toil Booking

Accrue Toil Accrual record

Sickness Sickness

Bank Holiday Bank holiday

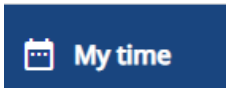
Foster Training Other absence selected

Unpaid Leave Other absence selected

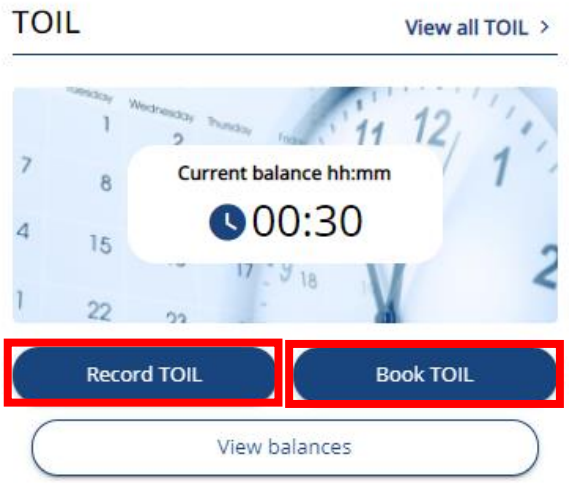
Compassionate Leave (NSA) Compassionate leave (entered by manager)

For Flexi and TOIL bookings, you will need to open the booking record to confirm whether the booking relates to Flexi or TOIL.

TOIL

TOIL is accessible via both the homepage and 

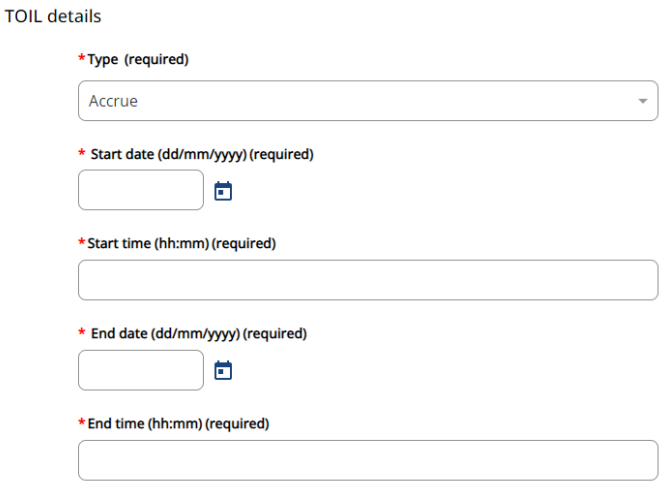
tab. The balance is displayed within the TOIL widget. You now have the button options to ‘Record TOIL’ or ‘Book TOIL’, and this will open the required template:



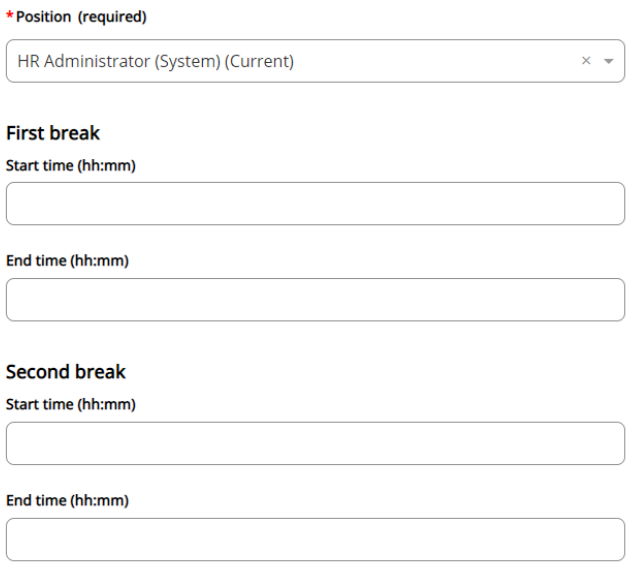
TOIL should only be used in agreement with your line manager for the majority of circumstances Flexi should be used.

Record TOIL

To record TOIL, click on ‘Record TOIL’ button (as shown in the image above), and fill in the template as before, entering the start date and time and end date and time:

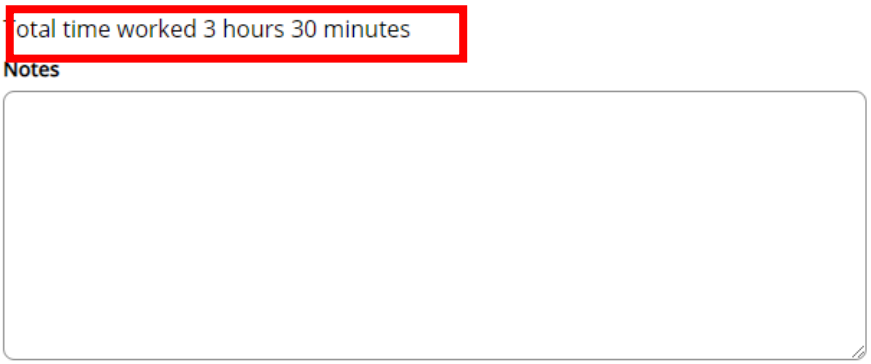


Once these have been entered, the break times fields will appear below the position to enter if applicable:



If you only have one position, the position field will auto-populate once a start date and time has been entered. If you have more than one position however, you will need to select from the dropdown list which role the hours recorded relate to.

The total time worked based on the information you entered will be displayed:



The notes field can be used to enter details of the reason for accruing TOIL rather than entering as flexi.

When you have completed, go to the bottom and ‘SAVE’ the TOIL record.

The Record TOIL button will take you to a new record blank template.

If you are finished with making any holiday requests, you can return to the page you were on previously either - takes you back to ‘My Time’ or takes you back to the homepage (otherwise known as the ‘Dashboard’).

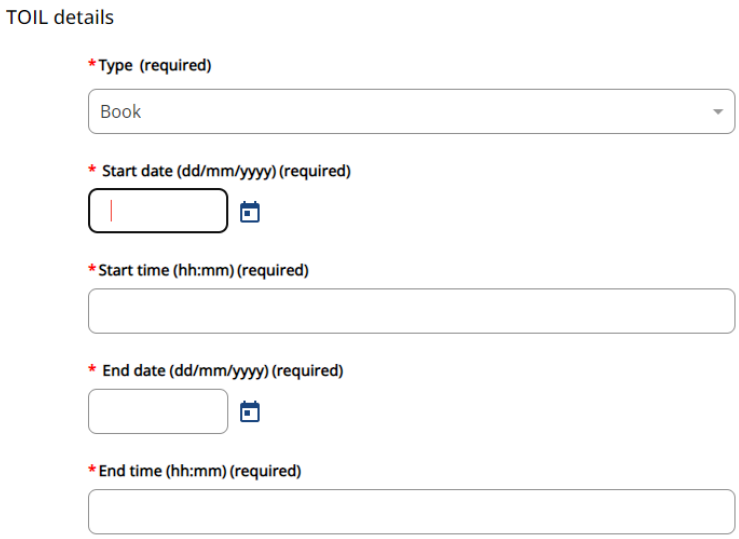
The other option is to click on the logo, which also takes you back to the homepage.

Booking TOIL

To Book Flexi, click on the

button.

Enter the date/s and times required for the TOIL booking (if it is a whole day, remember to take off the half hour break time from the end time):



Again, if you only have one position, the position field will auto-populate once the date/s and length of booking has been entered. If you have more than one position however, you will need to select from the dropdown list which role the booking relates to. (Please make sure you select the role that the booking affects based on your working patterns, so that the booking is deducted from the correct balance and the request is sent to the correct manager to authorise):

When you have entered the booking details, go to the bottom and ‘SAVE’ the TOIL booking to submit to your manager for authorisation.

The Book TOIL button will take you to a new flexi booking blank template.

If you require to book another TOIL booking, rather than returning to the overview, you can use the

button to continue a new request.

If you are finished with making any TOIL booking requests, you can return to the page you were on previously either -

takes you back to ‘My Time’ or

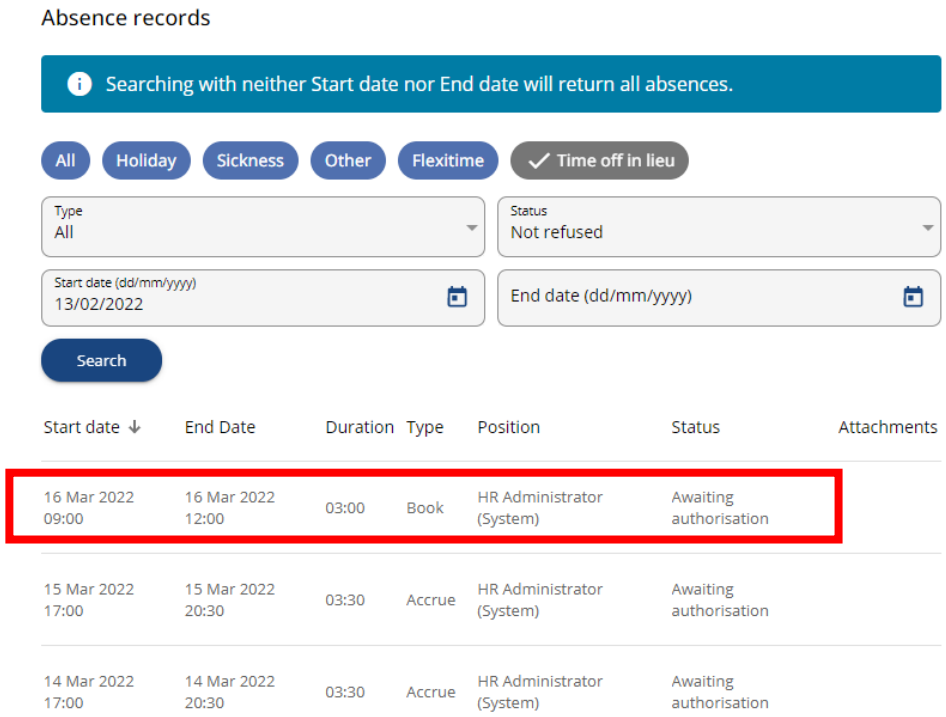
takes you back to the homepage (otherwise known as the ‘Dashboard’).

The other option is to click on the

logo, which also takes you back to the homepage.

Amend/Cancel TOIL Record or Booking

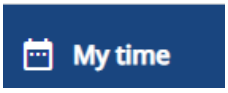
To amend or cancel a TOIL record or booking, you need to open the TOIL record via View all TOIL > to bring up the list of TOIL records and select the relevant date from the list by clicking on any of the information in the row:



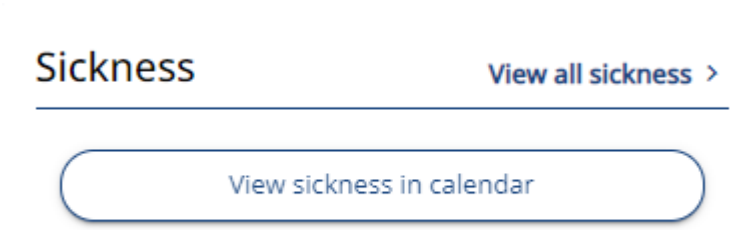
When the record has opened, to amend simply amend any details in the record, then scroll to the bottom and click Save . To cancel, scroll straight to the bottom and click Delete . The **cancel button** will just simply cancel any amendments you have not saved on the template, or take you out of the record.

To exit from a record, click < Back to Absence records then < Back to Overview .

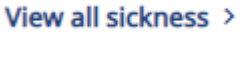
Sickness

Sickness is accessible via both the homepage and 

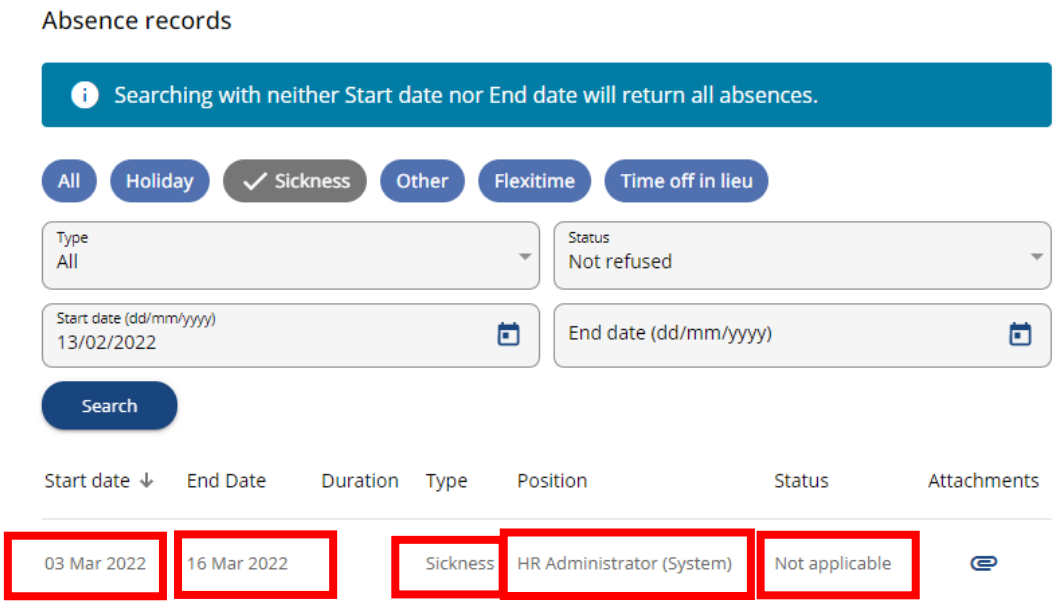
tab.



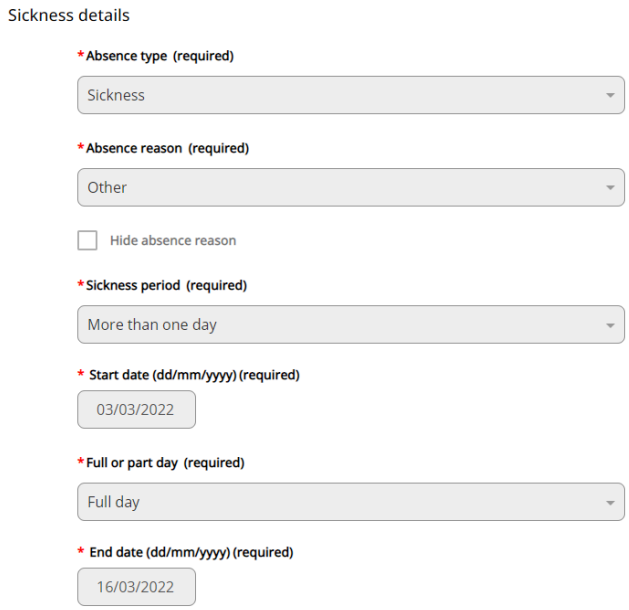
As before, you are able to view your sickness records in ESS, but you are not able to amend the records, including uploading documents. Your manager is responsible for recording your sickness and attaching dr's certificates and return to work forms.

To view, click on 

to bring up the list of sickness records and select the relevant record from the list by clicking on any of the information in the row:



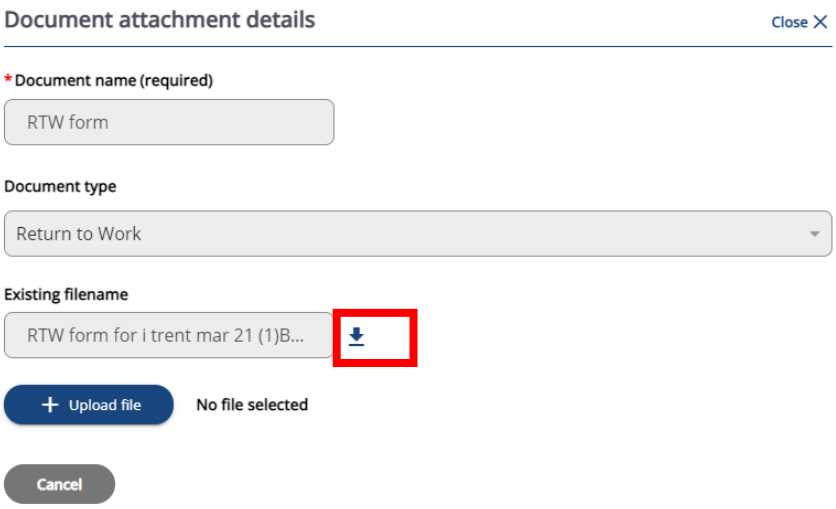
This will open the sickness record:



You can also view the attachment by clicking on the

This will show the document attachments against this sickness. Click on the document to open the details:

You can then download the attachment by clicking on the downwards arrow:



Click Close to come out of this, then Back to Absence records .

If you are finished looking at sickness, you can return to the page you were on previously either - Back to Overview takes you back to 'My Time' or Back to Dashboard takes you back to the homepage (otherwise known as the 'Dashboard').

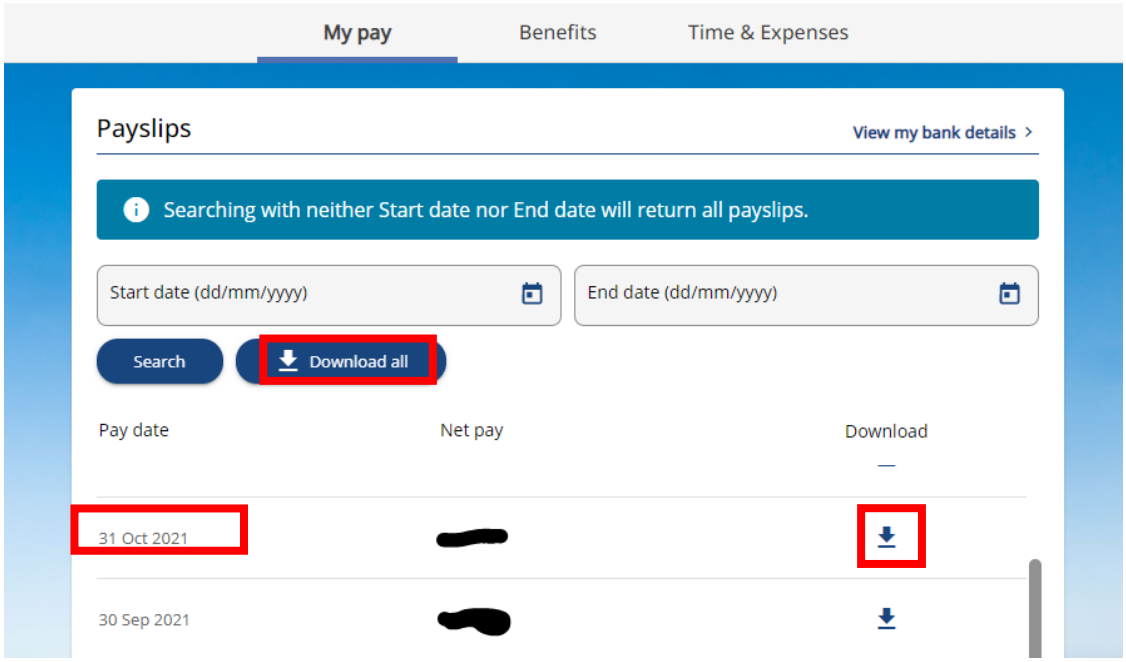
The other option is to click on the iTrent logo, which also takes you back to the homepage.

My Pay

This was formerly ‘Pay & Benefits.’ This includes Payslips, P60s and Time & Expenses.

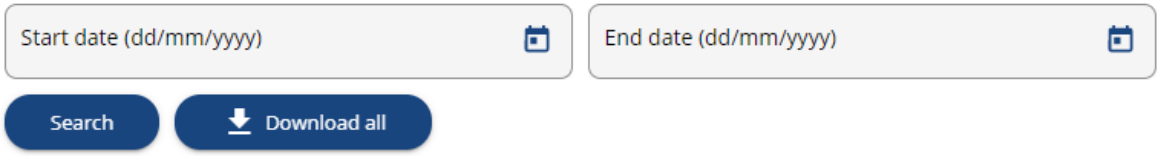
These are now separated out into further tabs:

Payslips

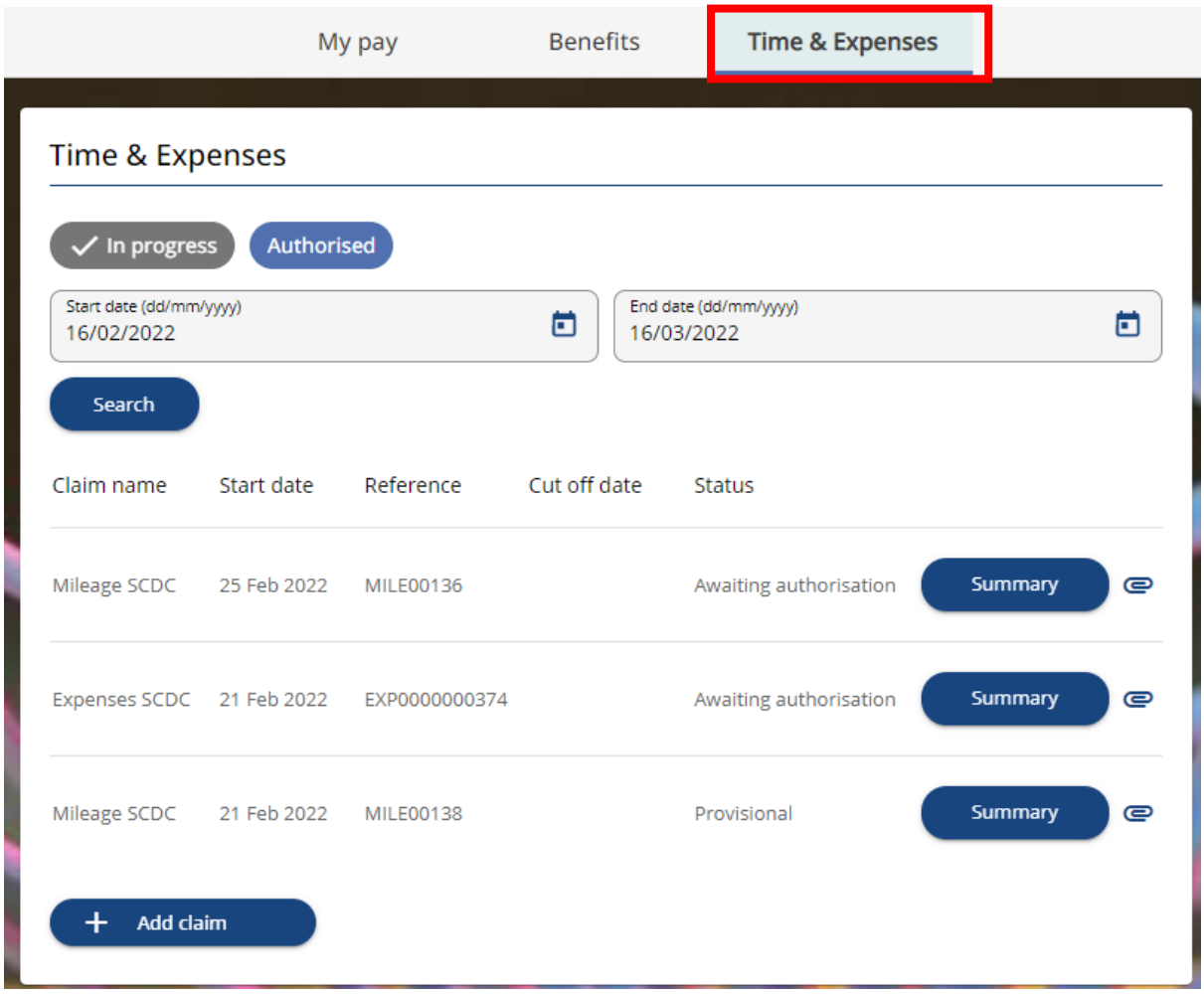


The page will load all your payslips, as before you can click on the date to open the payslip on the screen or download either individual payslips using the or download them all via the ‘Download all’ button.

You can also use the filters to specify the date range:



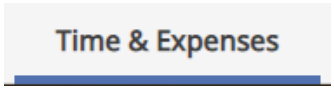
Time and Expenses claims



Mileage Claim

As before, please ensure you have first setup a Private vehicle in the 'Personal' section of Employee Self Service before you can claim for mileage.

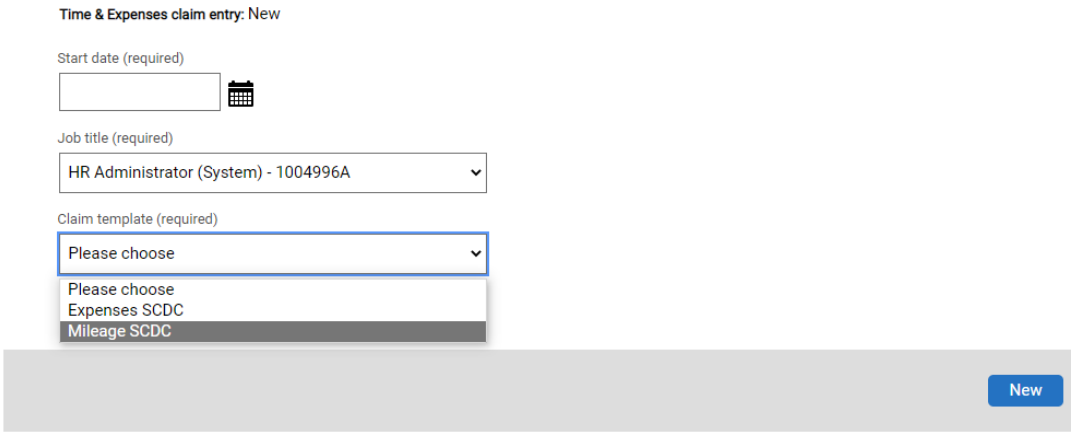
To start a new claim, go to the

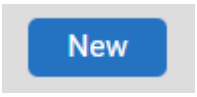
tab, and then click on the 

tab and

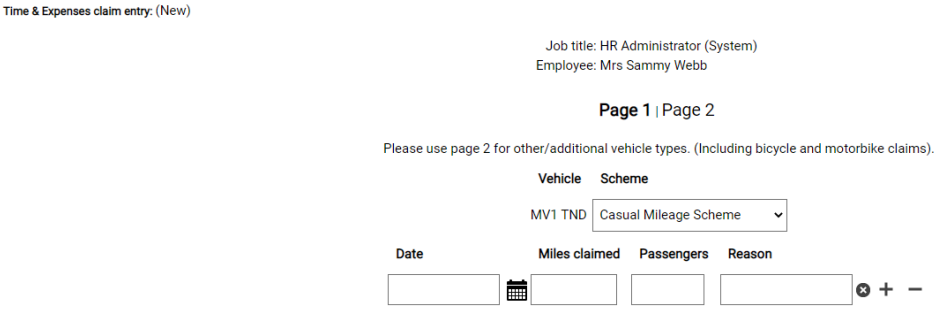
button.

This will open the claim template. As before, enter the Enter the starting date of the claim/claims you will be entering and select 'Mileage SCDC' from the list:

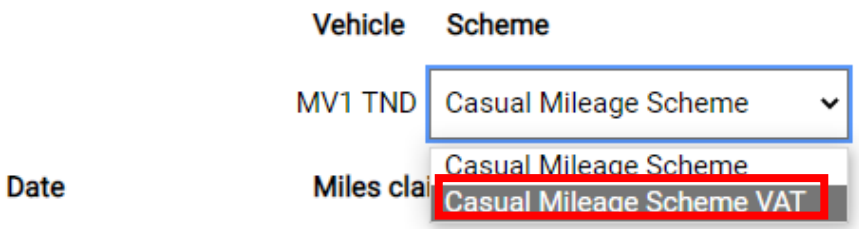


Then click 

This will open the next page:

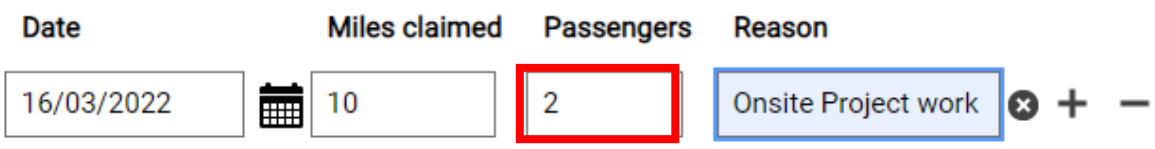


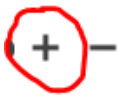
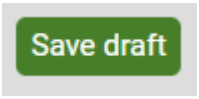
It still pulls your default vehicle setup in 'Private vehicle details' and you will need to select the relevant scheme from the dropdown, dependant on whether you have a VAT receipt or not:



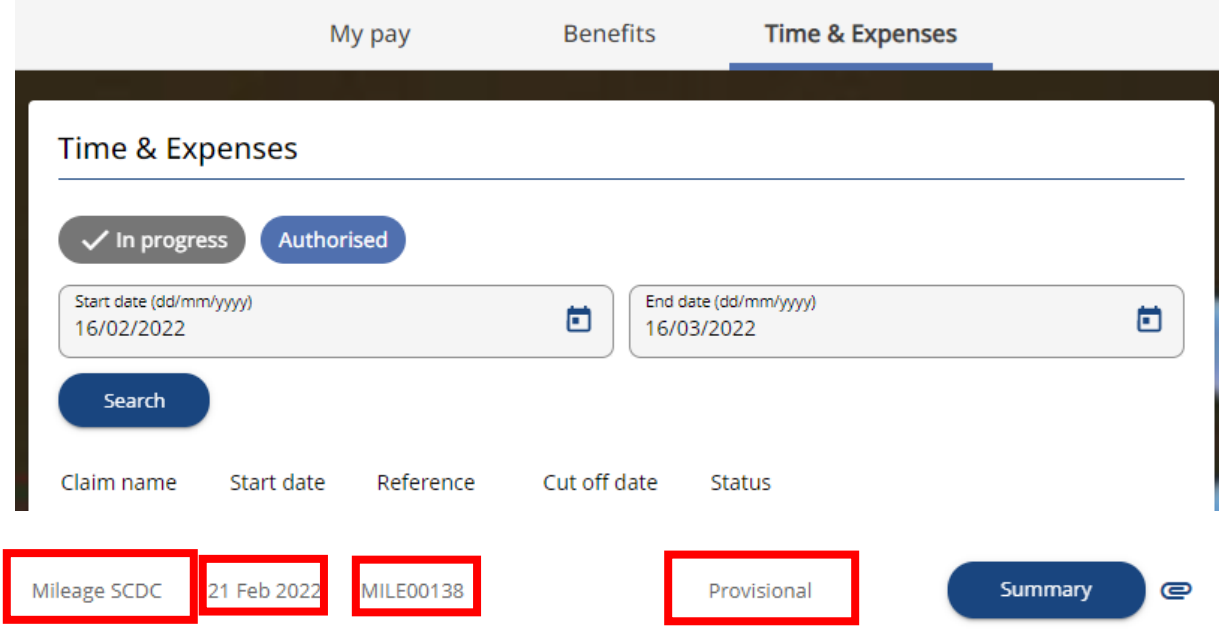
Make sure the VAT option is selected if you are claiming VAT.

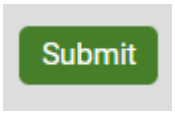
You will notice on this page when entering details of the claim, there is also now an option to enter details of passengers during the journey to be able to claim the 5p per passenger rates:



If you do not have any passengers, you can just leave this field blank. If you want to add further dates to the claim template, use the  to add additional lines, or you can  to come back to later.

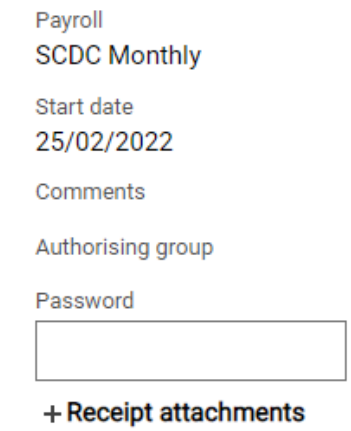
If coming back to later, return to the Time & Expenses Tab and click on any of the information in the row of the provisional claim template to open it up:



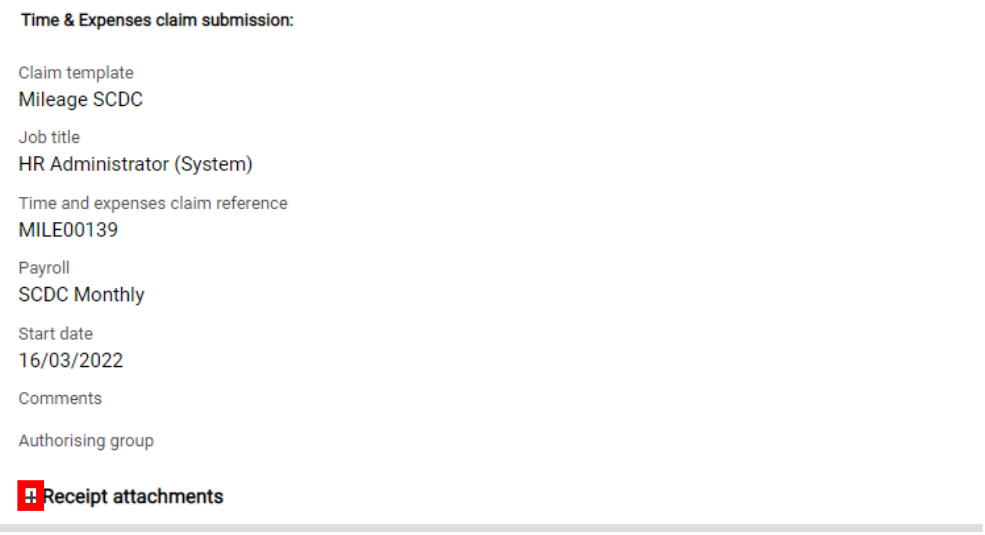
When you are ready to submit the claim, click 

The final submission page opens.

For non-single sign-on Users, you will first need to enter your password (the same one you use to login) before moving onto receipt attachments:

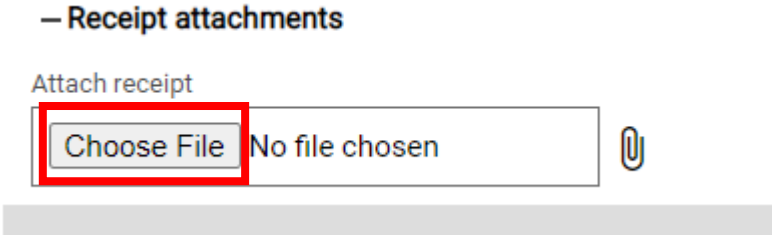


Single Sign on Users will go straight to Receipt attachments:



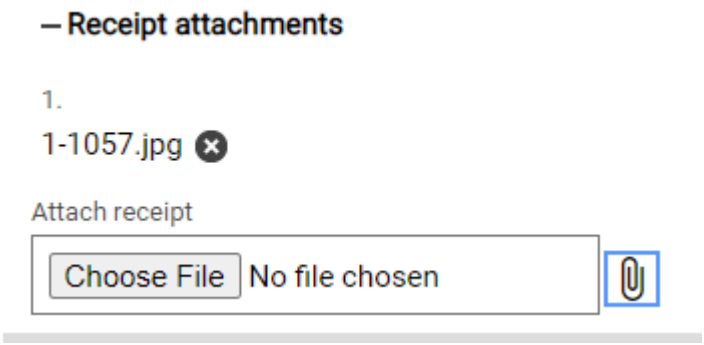
Expand the ‘receipt attachments’ clicking on the ‘+’ as circled in the above image.

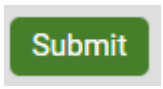
Then ‘Choose File’ and select the correct file of your receipt in your documents:



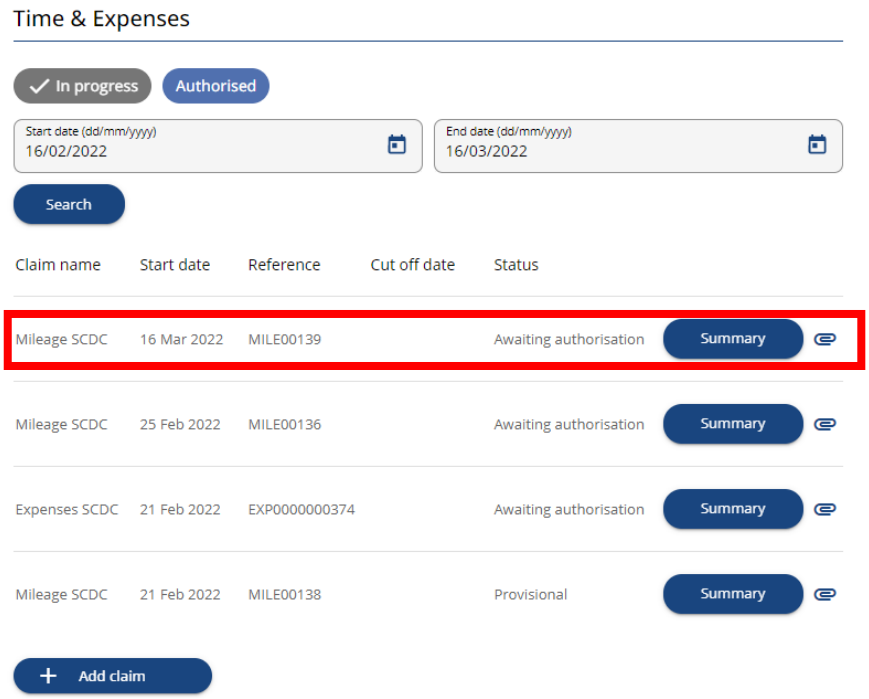
Click on the to attach to the claim.

You can repeat this process to attach as many receipts as required:



When all receipts are attached, click 

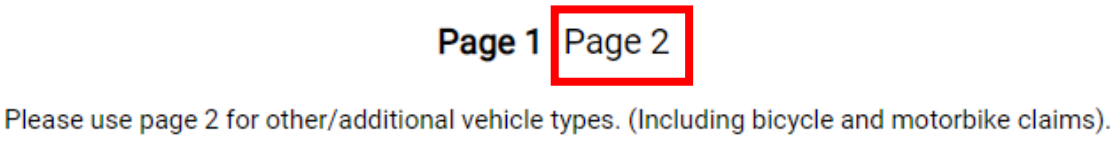
The claim will be visible under the ‘Time and Expenses’ section, awaiting authorisation:



The claim will need to be authorised by both your manager and payroll so will not show as completed until payroll have added it to your pay.

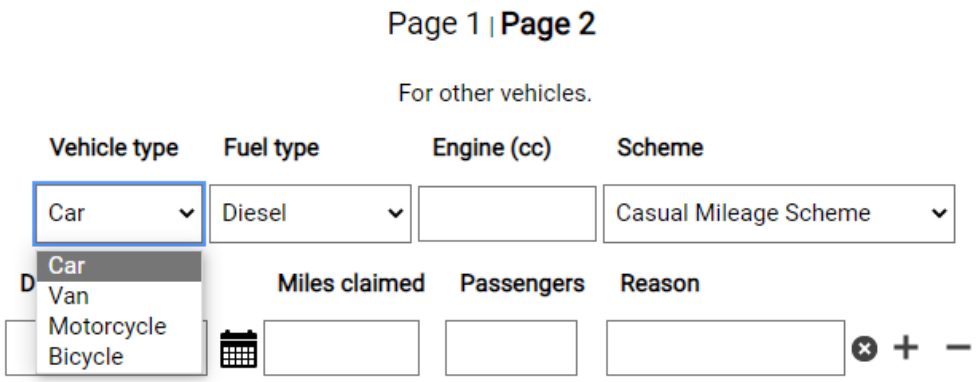
Other Mileage claim types

For other types of mileage claims, there is now a Page 2 that has been added to the template in order to be able to claim for these:



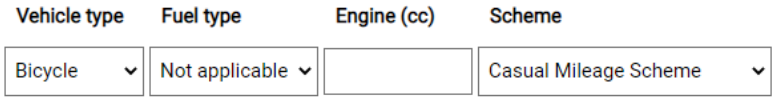
Click on the ‘Page 2’ to take you to this page:

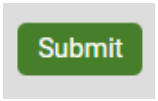
This page is setup similar, except it will not pull a ‘default vehicle.’ Instead, you can select the vehicle type and enter the details related to the vehicle. The list includes Motorcycles and Bicycles:



For employees, this page should only be used to claim for bicycle claims. Employees can only claim for cars which have the correct level of insurance coverage for business use, therefore a claim cannot be made on this page for a car that is not setup in their ‘private vehicle’ list with the insurance checked internally.

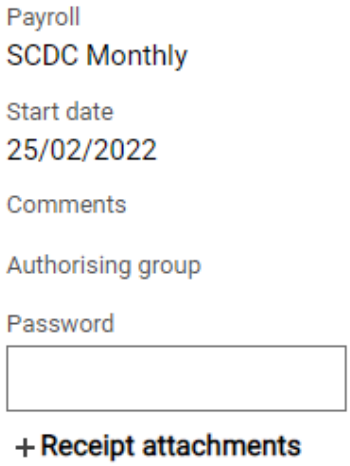
For the fuel type for Bicycles, please select ‘Not applicable’ and leave Engine (cc) Blank:



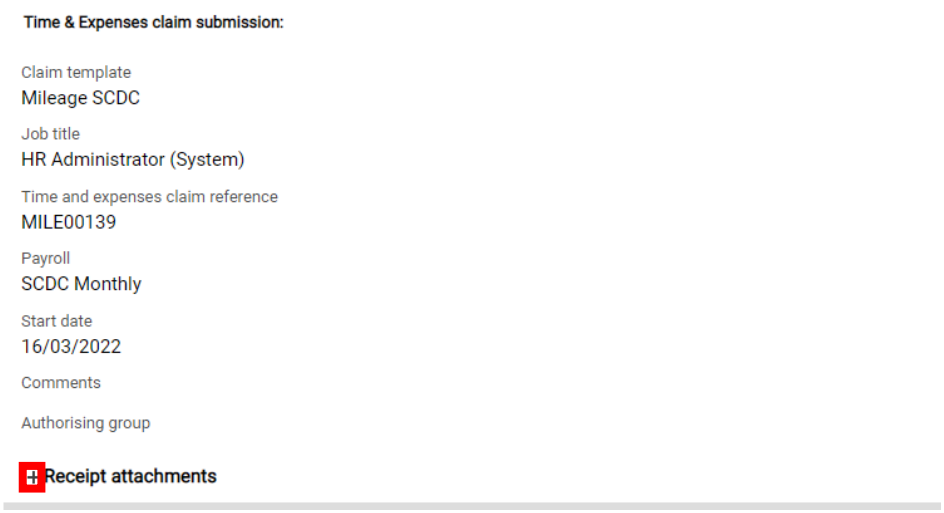
When you are ready to submit the claim, click 

The final submission page opens.

For non-single sign-on Users, you will first need to enter your password (the same one you use to login) before moving onto receipt attachments:

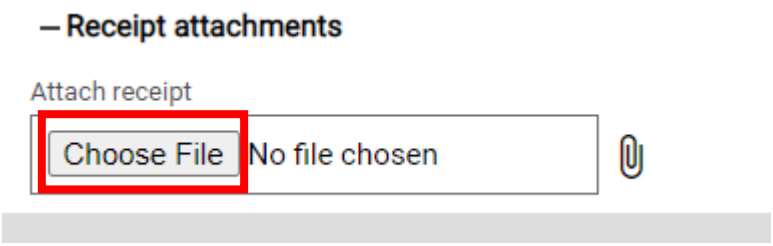


Single Sign on Users will go straight to Receipt attachments:



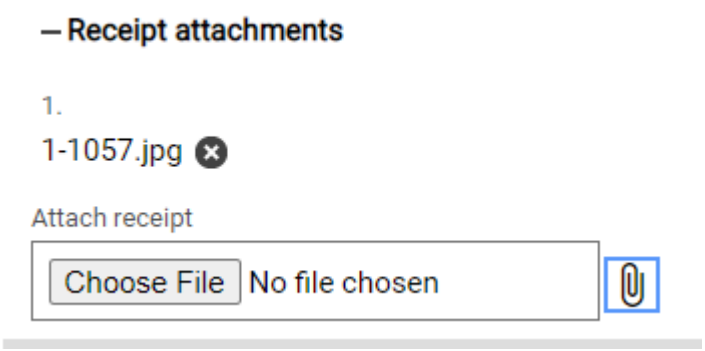
Expand the ‘receipt attachments’ clicking on the ‘+’ as circled in the above image.

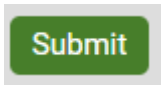
Then ‘Choose File’ and select the correct file of your receipt in your documents:



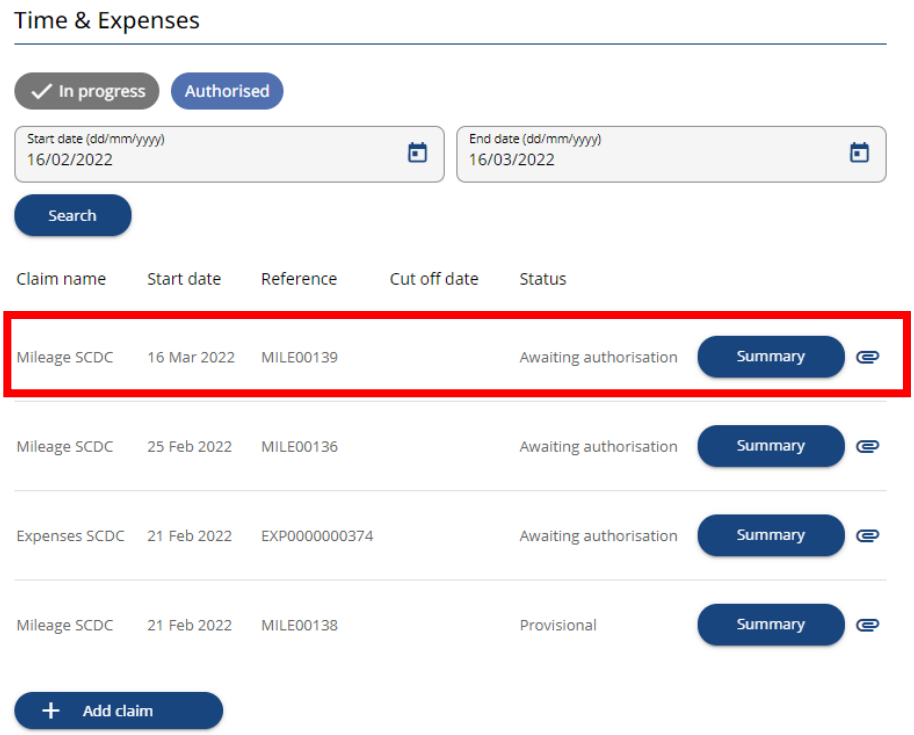
Click on the to attach to the claim.

You can repeat this process to attach as many receipts as required:



When all receipts are attached, click 

The claim will be visible under the ‘Time and Expenses’ section, awaiting authorisation:

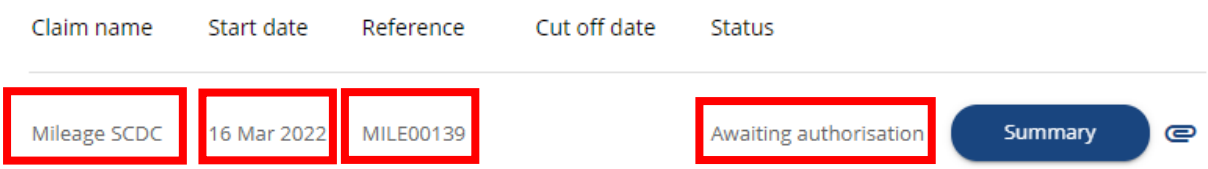


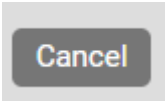
For claims using the other mileage claim types only e.g. bicycles, you can go straight to ‘Page 2’ and enter details for this only. You will not be required to attach a receipt for bicycle claims.

The claim will need to be authorised by both your manager and payroll so will not show as completed until payroll have added it to your pay.

Removing a Submitted Claim

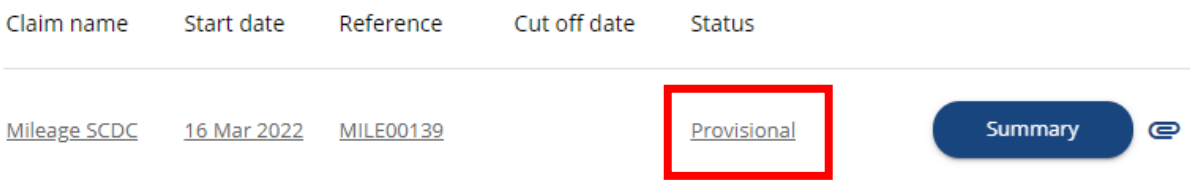
To remove a claim that has been submitted, you can open the claim by clicking on any information on the row:

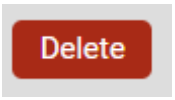


To remove a claim that has been submitted, you can open the claim and click 

on each of the pages it opens.

The claim will then become ‘Provisional’:

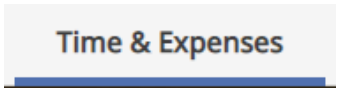


Open the claim again and this time click 

Other expenses claim

Adding an expense claim is much the same as adding a mileage claim.

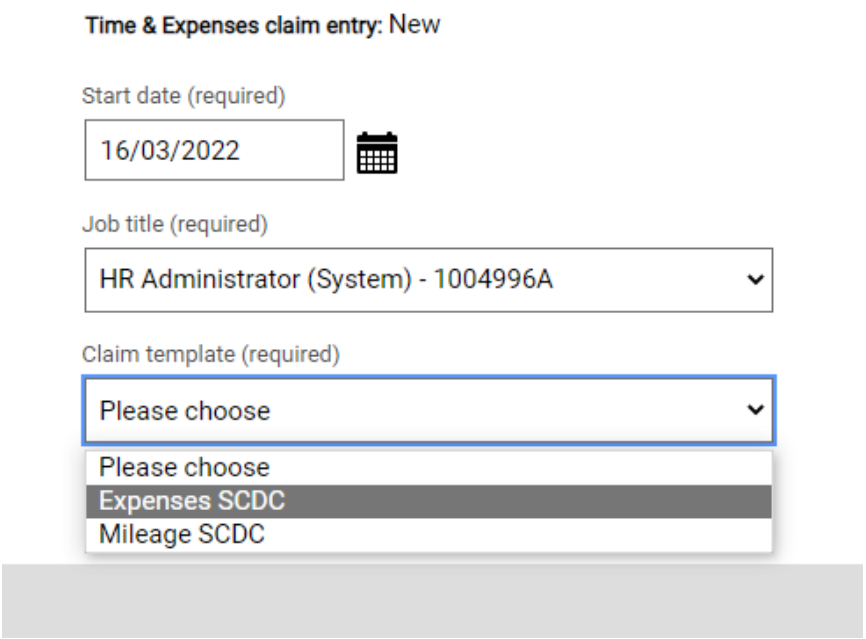
To start a new claim, go to the

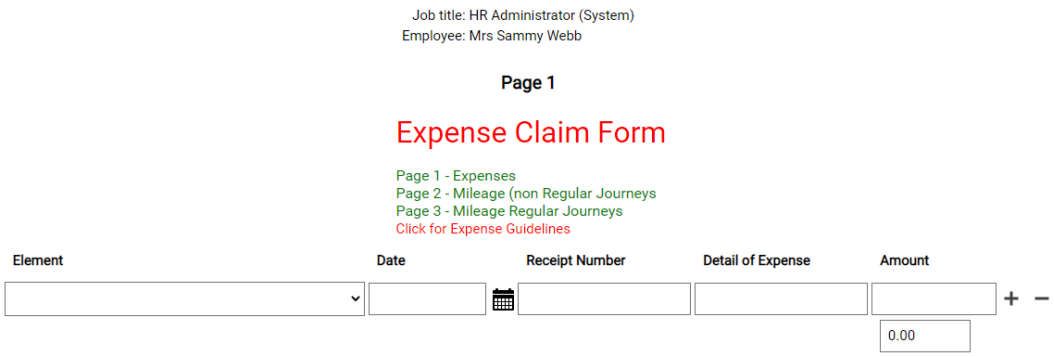
tab, and then click on the 

tab and

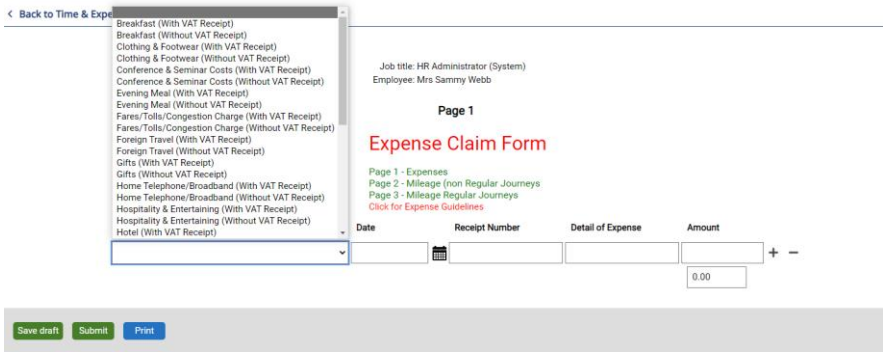
button.

This will open the claim template. As before, enter the Enter the starting date of the claim/claims you will be entering and select ‘Expenses SCDC’ from the list:

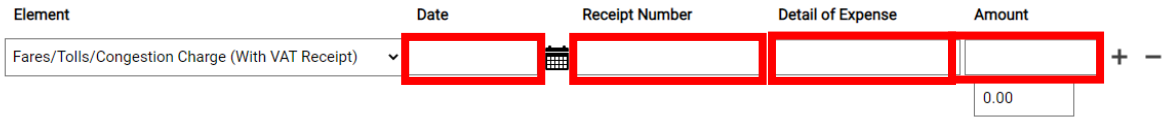


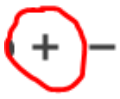
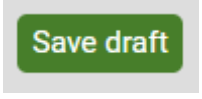


Select the relevant item from the ‘Element’ list for the type of expense you are claiming for:

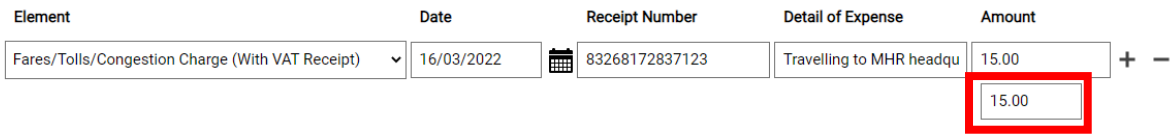


Then enter the date, receipt number, detail of expense in the available boxes:

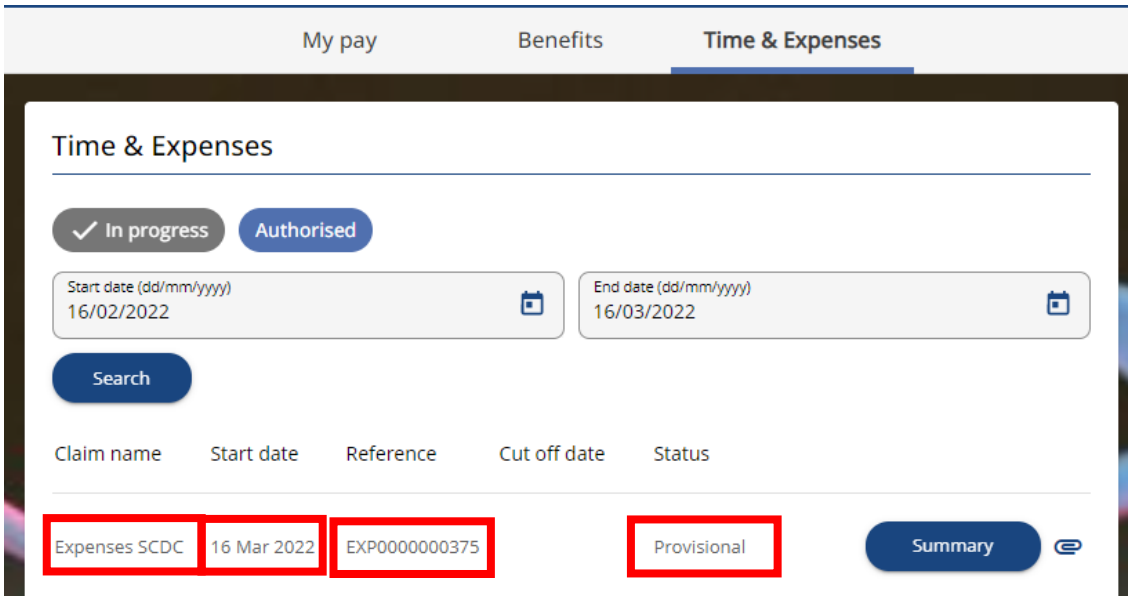


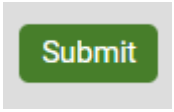
If you want to add further items to the claim template, use the  to add additional lines, or you can  to come back to later.

The total for the claim will calculate in the box below the claim line:



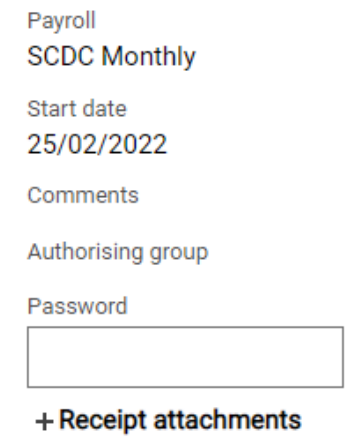
If coming back to later, return to the Time & Expenses Tab and click on any of the information in the row of the provisional expense claim template to open it up:



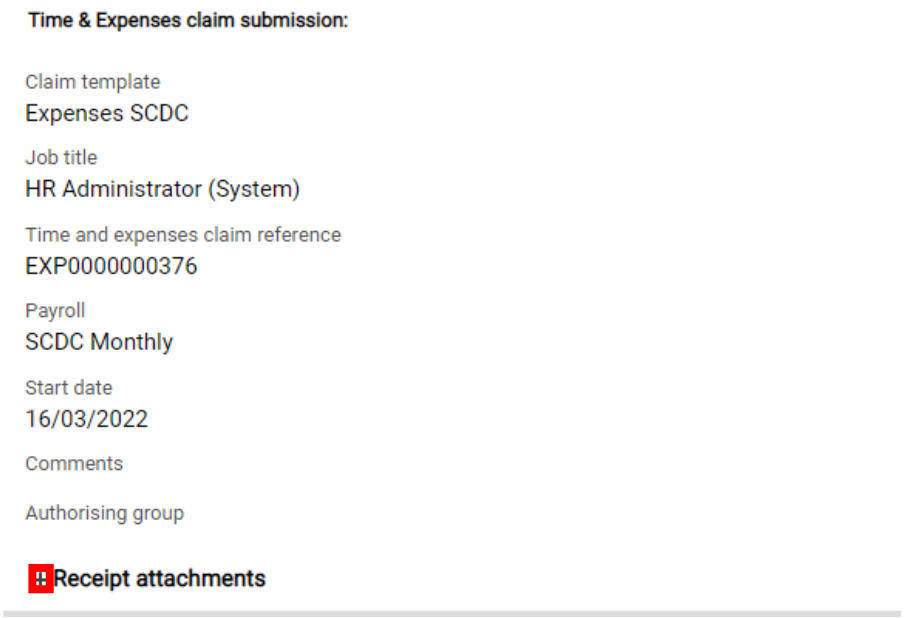
When you are ready to submit the claim, click 

The final submission page opens.

For non-single sign-on Users, you will first need to enter your password (the same one you use to login) before moving onto receipt attachments:

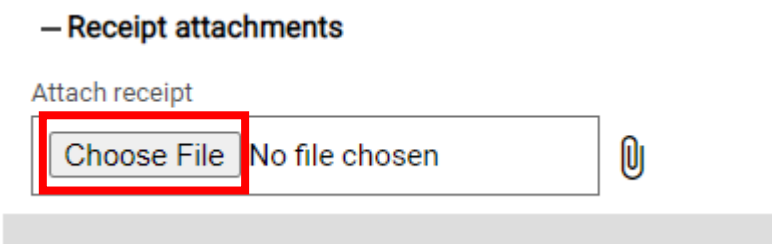


Single Sign on Users will go straight to Receipt attachments:



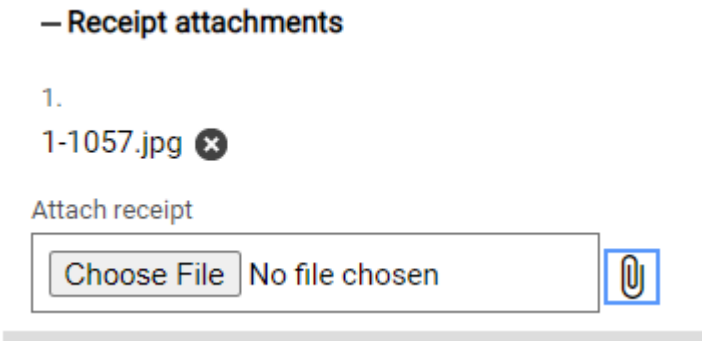
Expand the ‘receipt attachments’ clicking on the ‘+’ as circled in the above image.

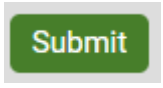
Then ‘Choose File’ and select the correct file of your receipt in your documents:



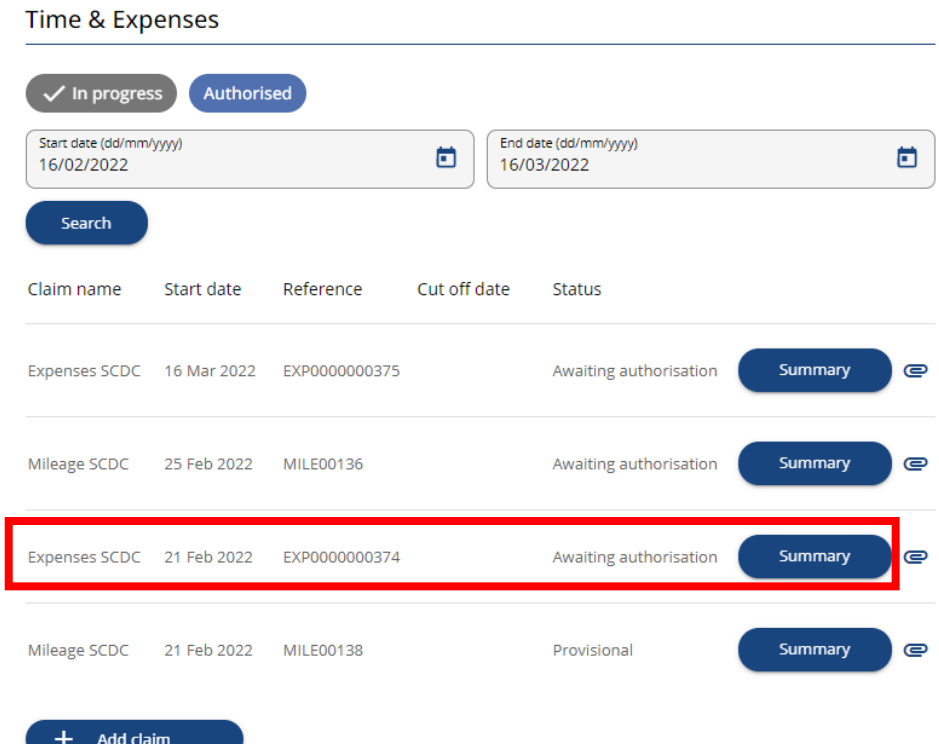
Click on the – to attach to the claim.

You can repeat this process to attach as many receipts as required:



When all receipts are attached, click 

The claim will be visible under the ‘Time and Expenses’ section, awaiting authorisation:



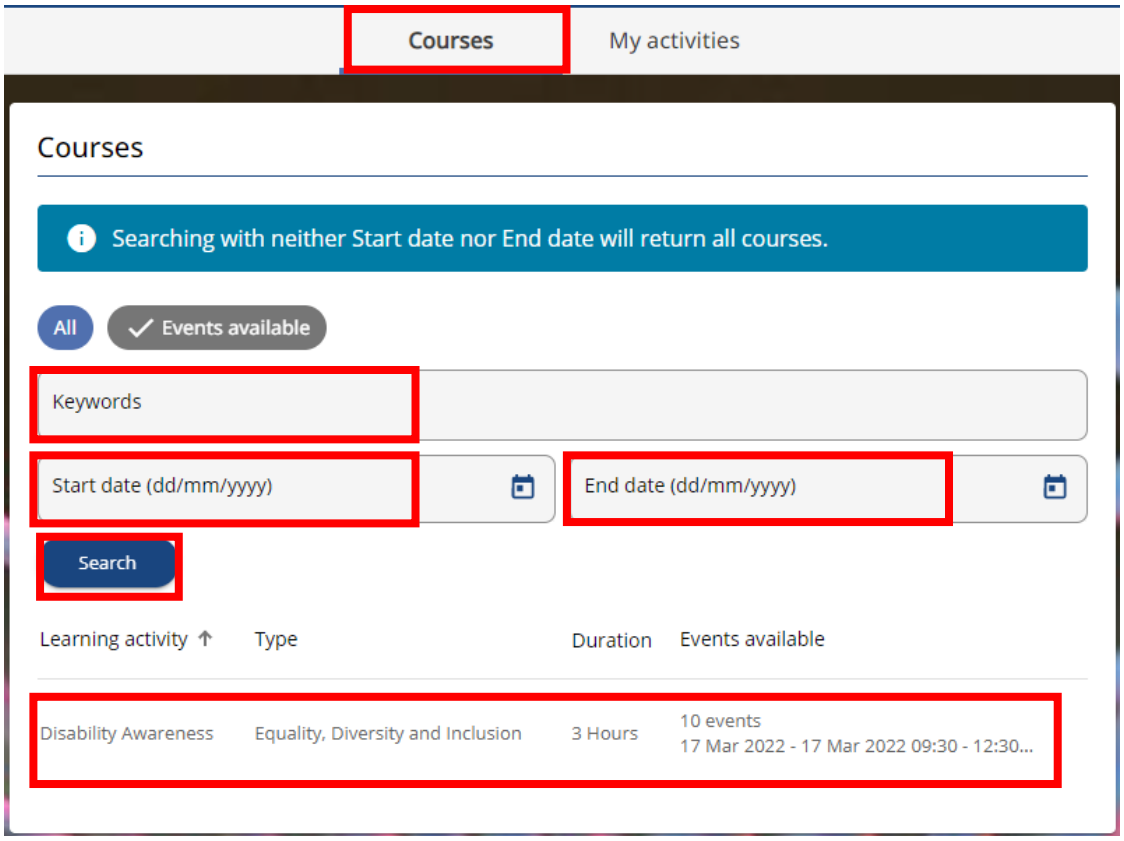
The claim will need to be authorised by both your manager and payroll so will not show as completed until payroll have added it to your pay.

Learning

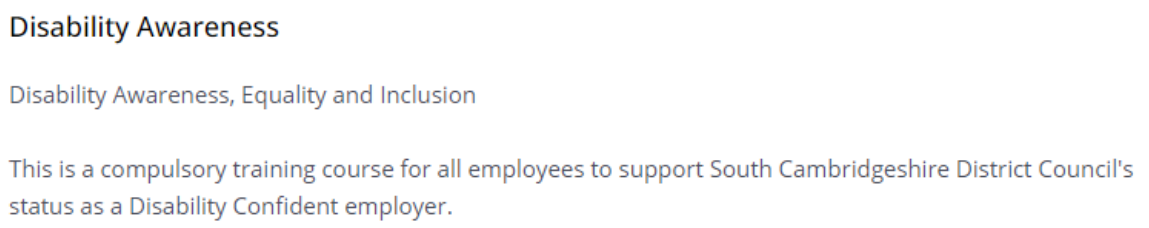
was formerly ‘Career & Development’ except it now only includes the learning activities under this tab (development comes under Talent which is a different Tab that will be addressed further down).

Courses

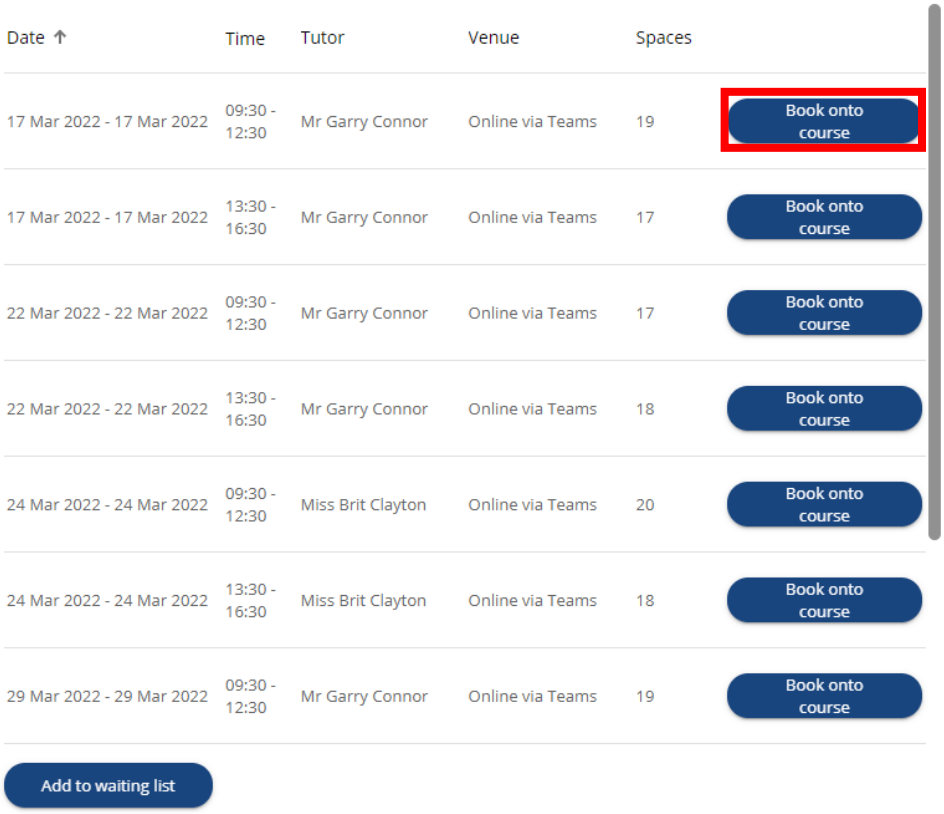
All available internal training can be found under the courses tab. You can use the filters at the top to search by ‘Keywords’ or specific dates, otherwise a blank search will bring up all available training courses in a list below:



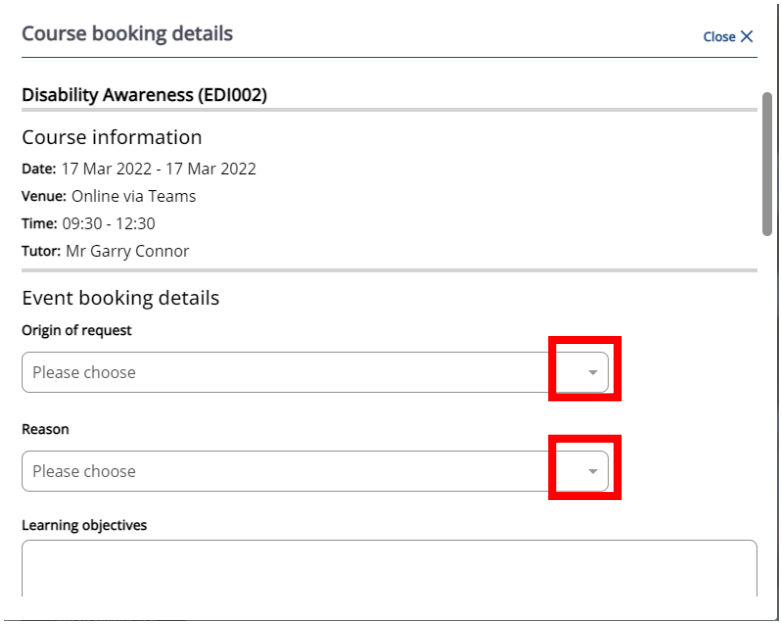
Click on an activity listed to find out dates available to book onto. The description will be at the top of the page:



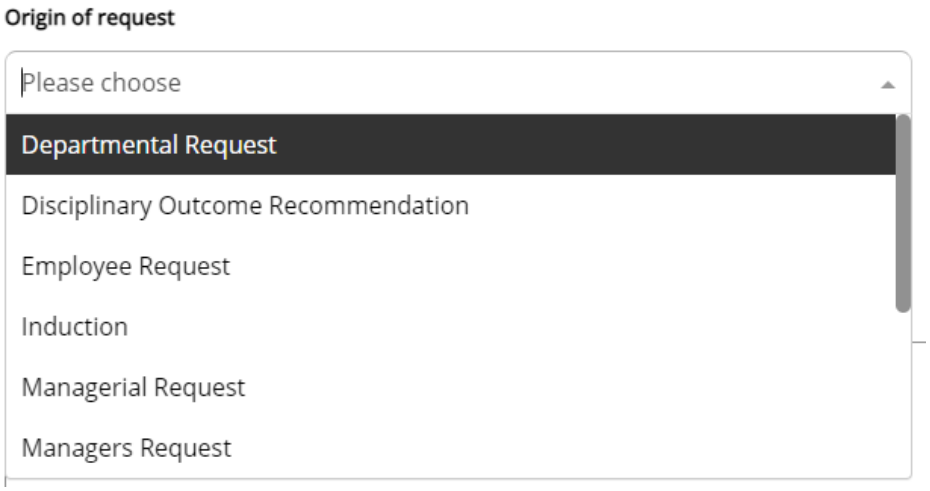
Scroll down to see all available courses to book on. If you would like to book onto a course, click on the ‘Book Course’ button against your Chosen date and Time:



This will open the course booking details:

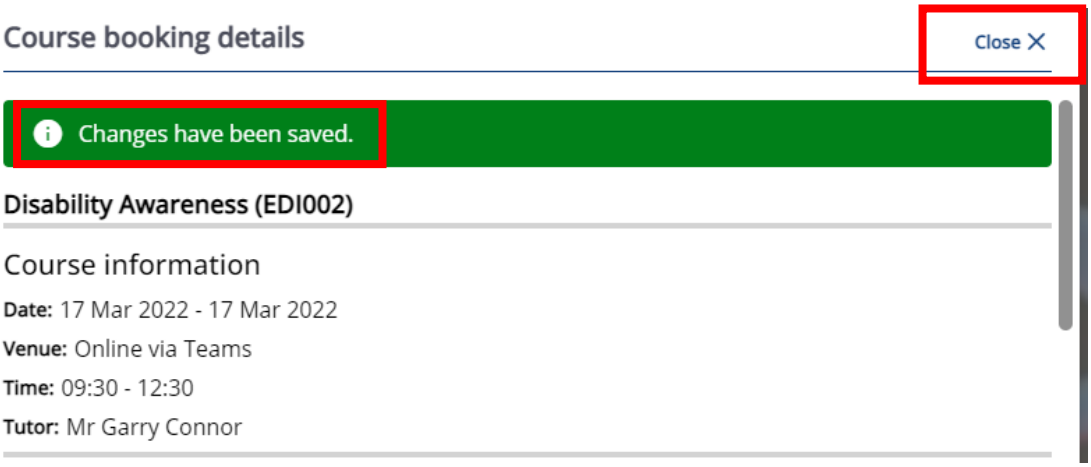


Fill in the fields selecting from the dropdowns for ‘Origin of request’ and ‘Reason’, then if applicable add any learning objectives to the text box available.

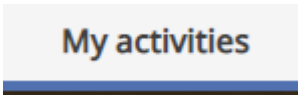


Then scroll to the bottom and press to complete the booking.

It will confirm changes have been saved, then Close the booking details:

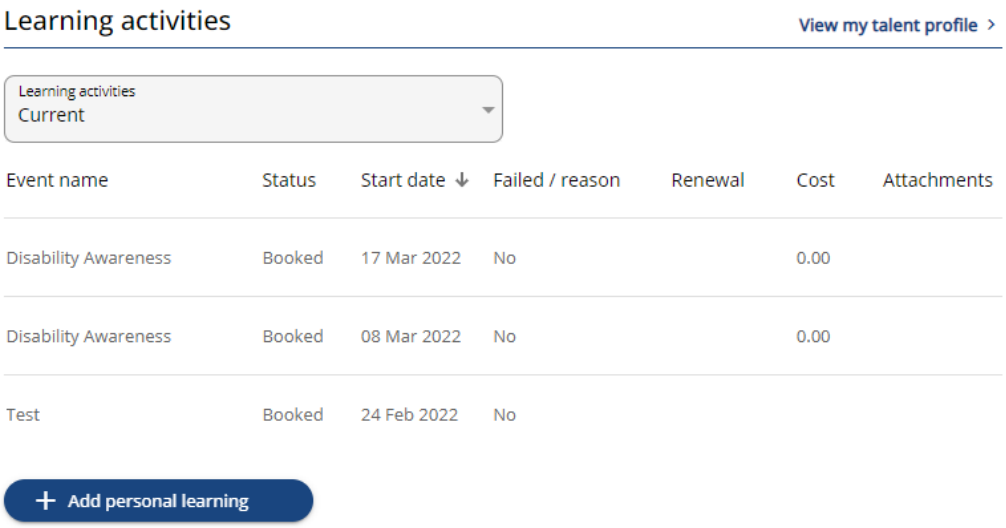


Viewing the courses you are booked onto

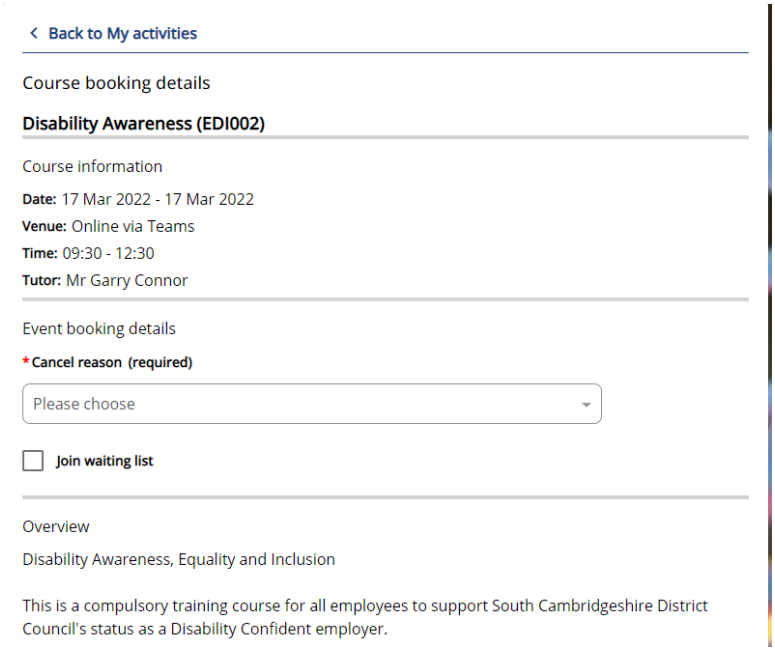
To see the courses you are booked onto, go to the 

tab.

The courses you are booked onto are listed under ‘Learning activities’:

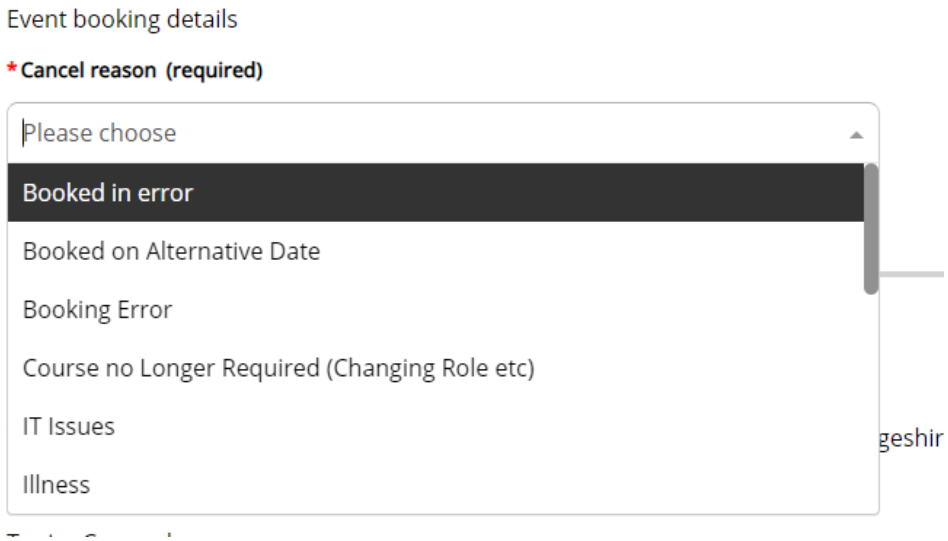


If you want to view further details, on any of the information in the row of an event and the course details will open up:

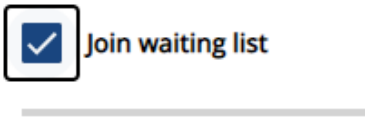


Cancel from a course

From the course details page (as shown just above), you will see there is an option to cancel, providing a cancellation reason from the dropdown:



You also have an option to tick to join the waiting list:

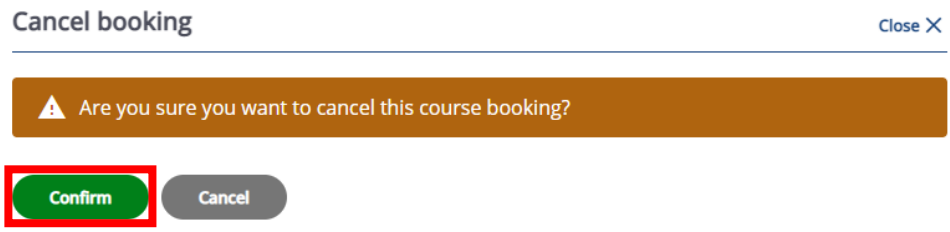


If you want to cancel this date and book onto another available, do not tick this box.

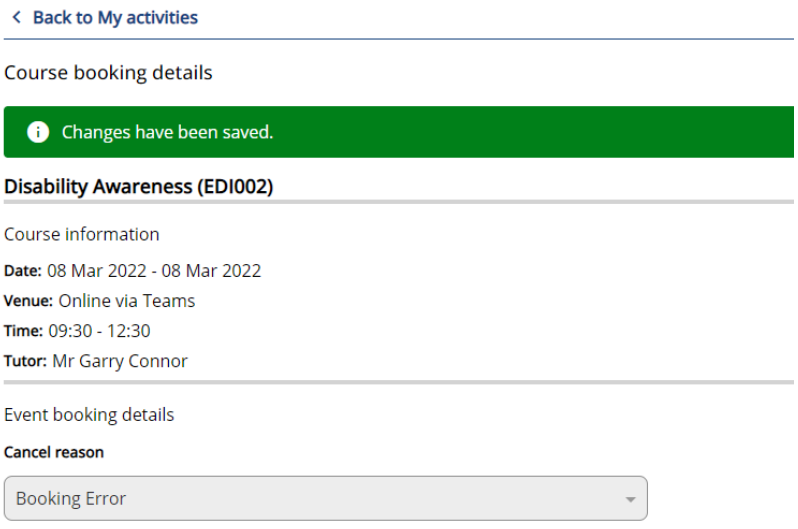
Then scroll to the bottom and click

to cancel the booking.

A warning message will ask if you are sure (in case you have entered in error or changed your mind), click confirm:

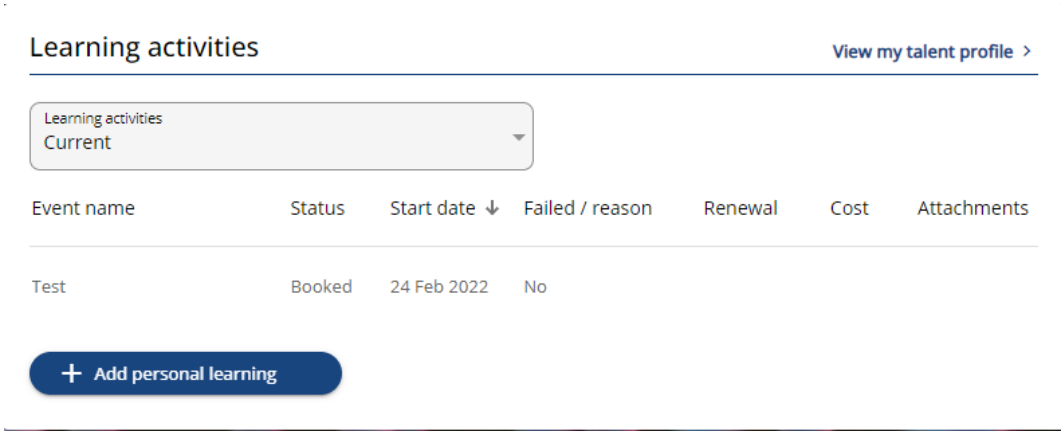


The record will display ‘Changes have been saved’ when the booking has been cancelled:



To come out of the record, click on < Back to My activities .

You will then see the event has removed from your learning activities list:



Failed event

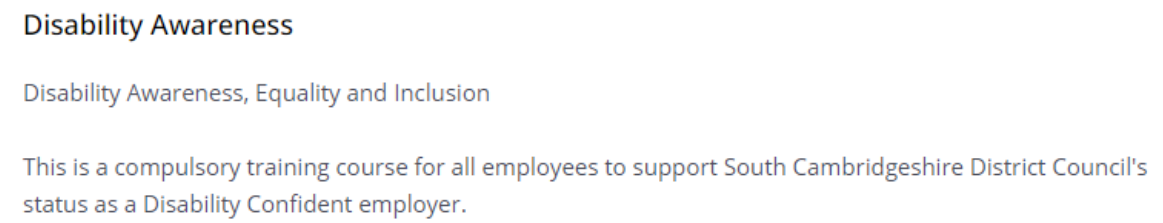
If you do not attend the event, the Failed reason will be listed as Yes.

Add to waiting list

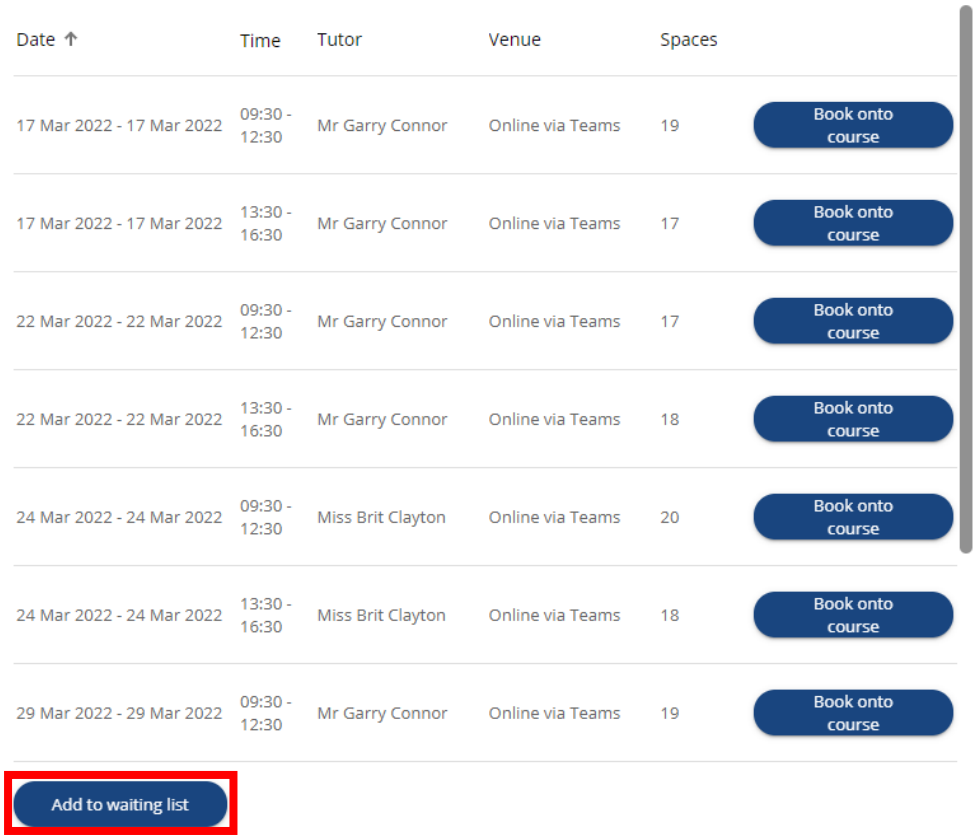
Navigate to the courses page, by clicking on the 'Learning' Tab

Click on an activity listed to find out dates of events scheduled.

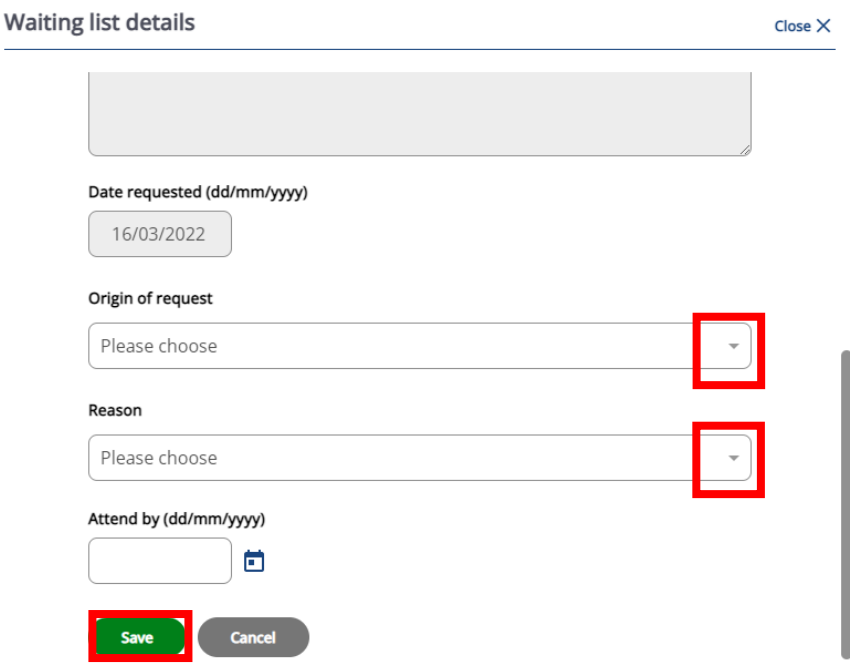
Click on an activity listed to find out dates available to book onto. The description will be at the top of the page:



Scroll down to see all scheduled course dates and times. Click on the ‘Add to Waiting list button’:

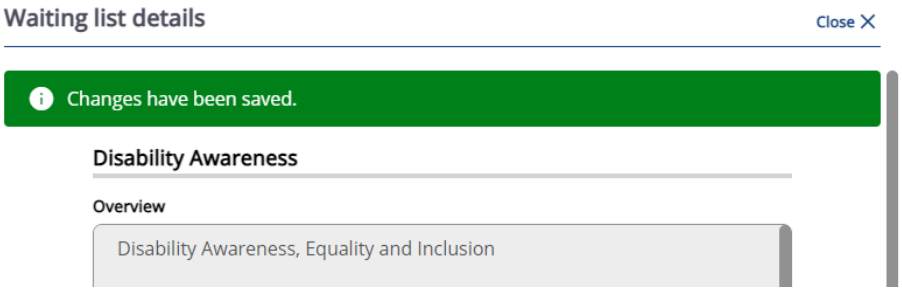


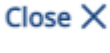
The Waiting list details page opens. Scroll to the bottom and as with booking, select an ‘Origin of request’ and ‘Reason’ from the dropdown lists. Then also give an attend by date for when you want to have completed the course by:



Then click

The screen will show changes have been saved to signify you have been added to the waiting list:

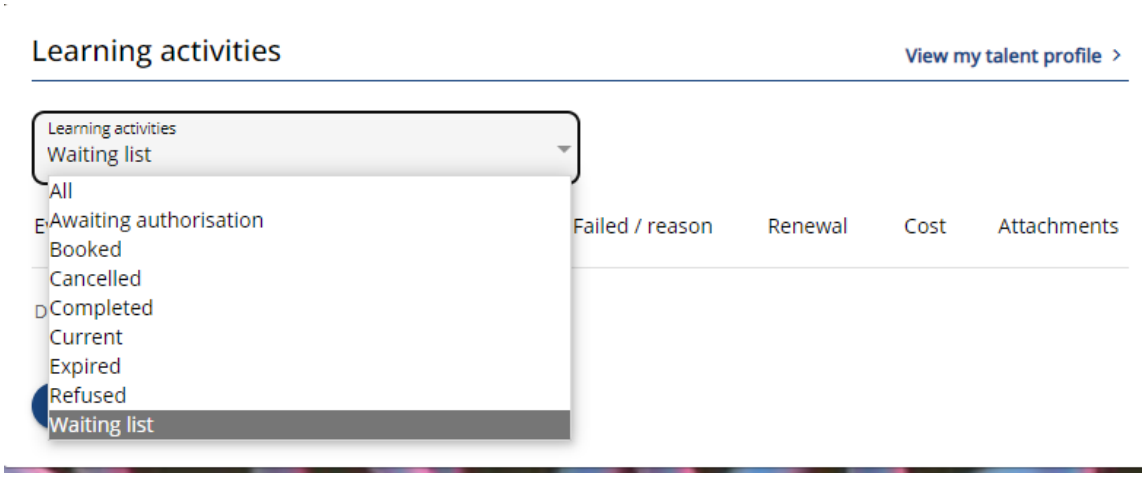


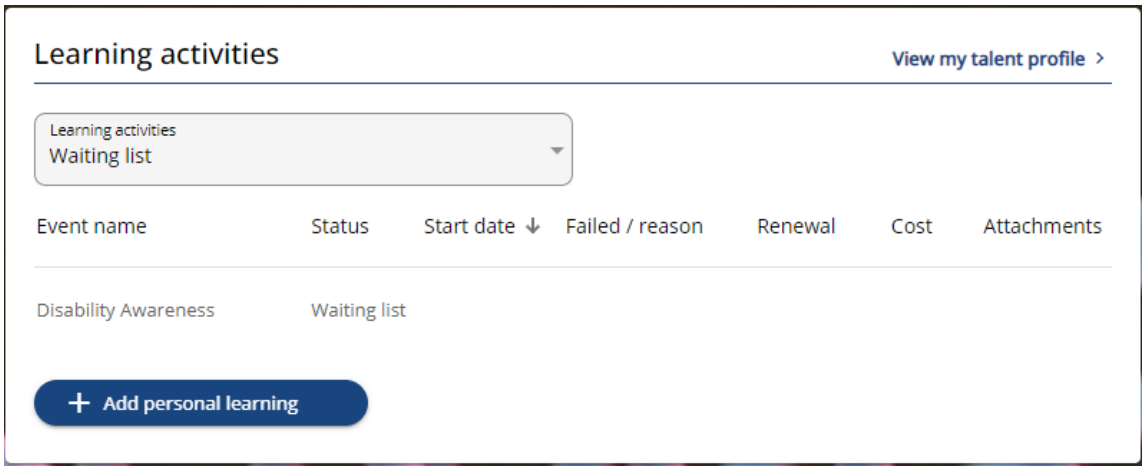
Click 

to come out of this screen.

Then < Back to Courses to return to the main learning page.

To view courses you are on the waiting list for, go to My activities, then under the Learning activities tab change the filter to ‘Waiting list’:

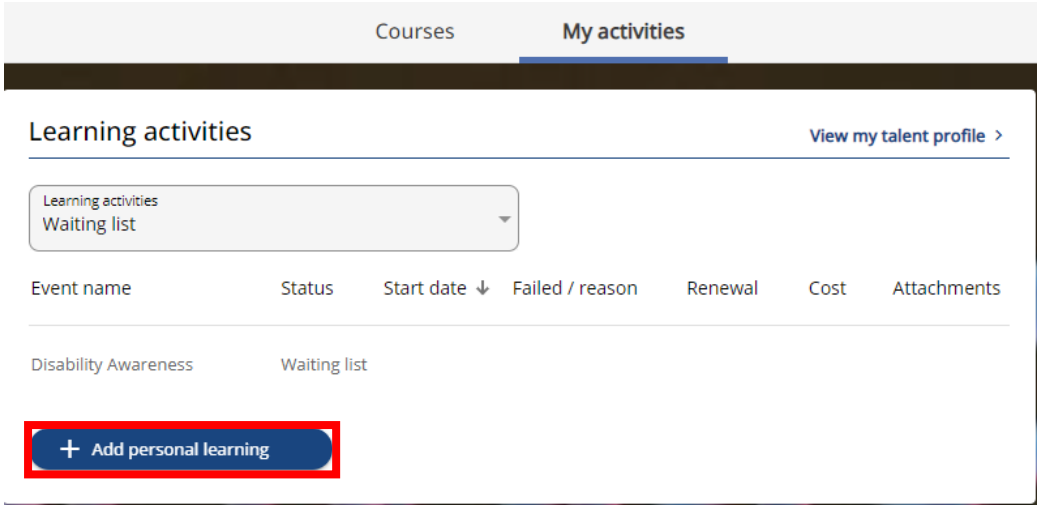




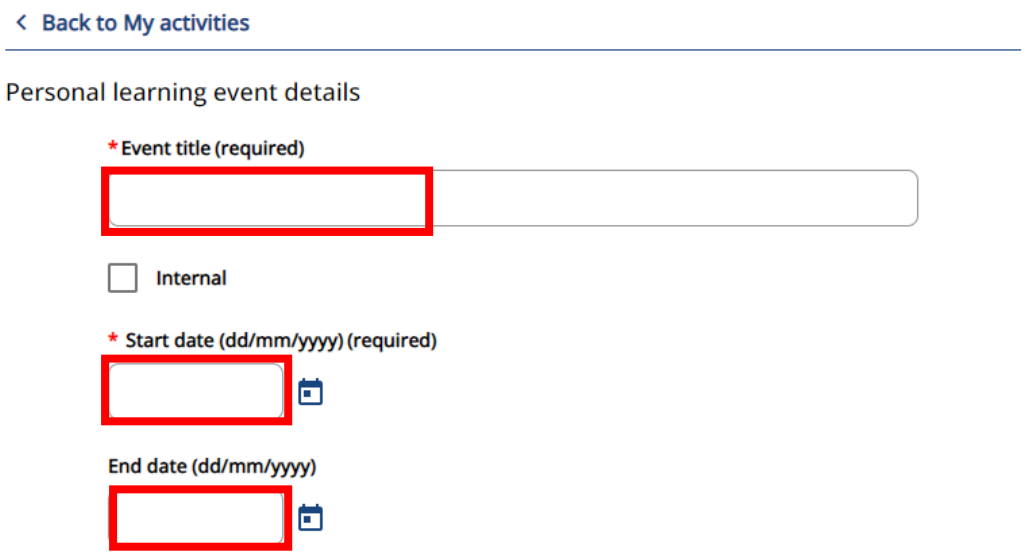
Personal learning

Under the ‘My activities’ tab, you also have the option of adding in any scheduled personal learning activities, which may include any training you are doing outside of SCDC provided courses.

Click on ‘+ Add personal learning’:



This will open the Personal learning event details page for you to fill in the details. Give the event a title, and enter the start and end date:

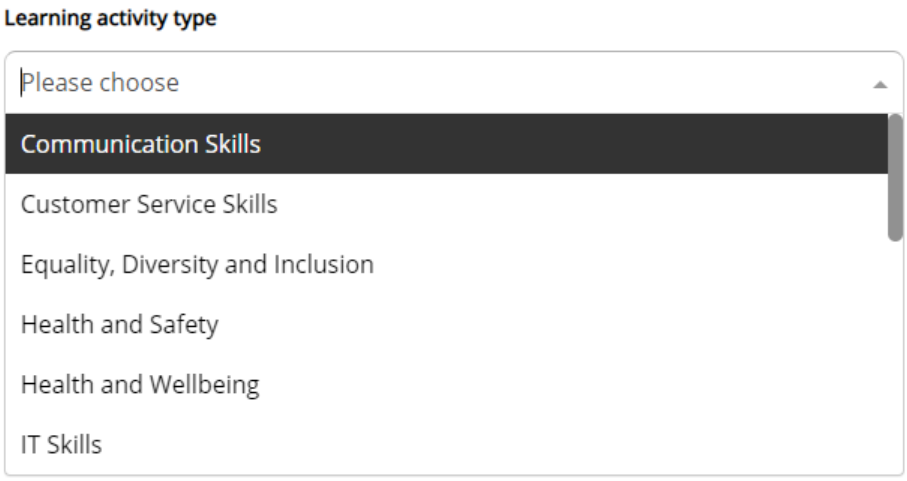


(If it is an internal event, you can click the tick box, however most internal events you will be able to directly book onto).

Select a duration from the drop-down list (if the whole day select ‘Daily’):

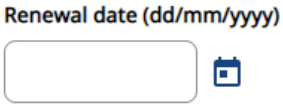
You may also enter the learning hours for you to document:

Select a learning activity type applicable from the available list (if there is not an applicable option available, please contact the HR System analyst to have this added).



Only if applicable add the learning event code, otherwise you can leave this blank:

If the training requires renewal you can enter a renewal date here:



Otherwise leave this blank.

Then you can mark whether the training has been completed and whether there is any associated scoring/marking:

Otherwise leave blank.

When you have finished entering the details **click**

to add the learning activity to your activities. **Do Not click**

as this will open a new record template.

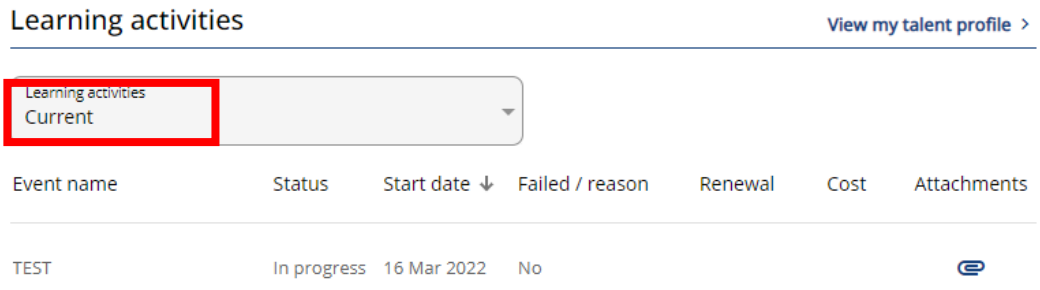
If you wish to add another learning activity, from here you can click the

to open a new template to complete.

Or to come out, scroll back to the top of the page and click on

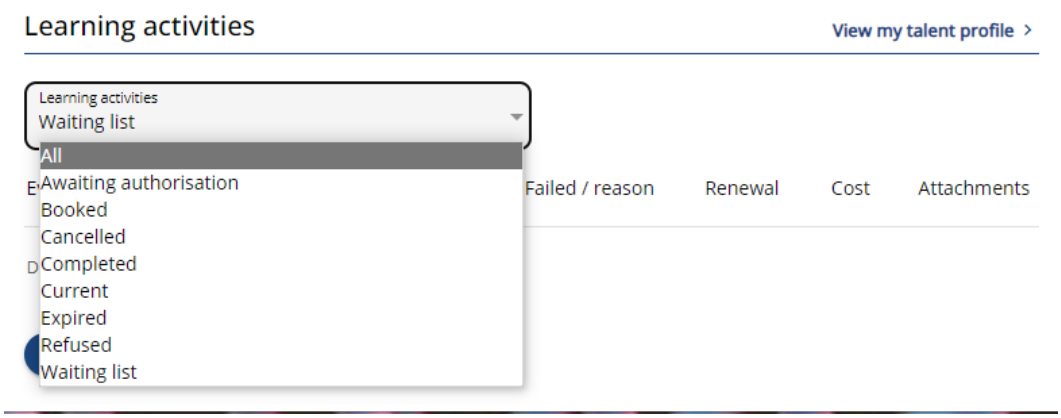
.

These will appear in the learning activities list (depending on whether it is current, completed etc. you may need to amend the filter – see more on filters below). E.g. Current:



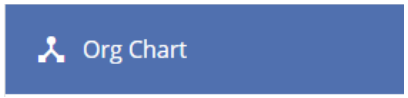
Please be aware this will add an event to your calendar, so only put training events here which are held at a specific time. If you are doing a long-term course with no specific timings, this will be best to add as an objective when Performance is available.

Learning activity filters



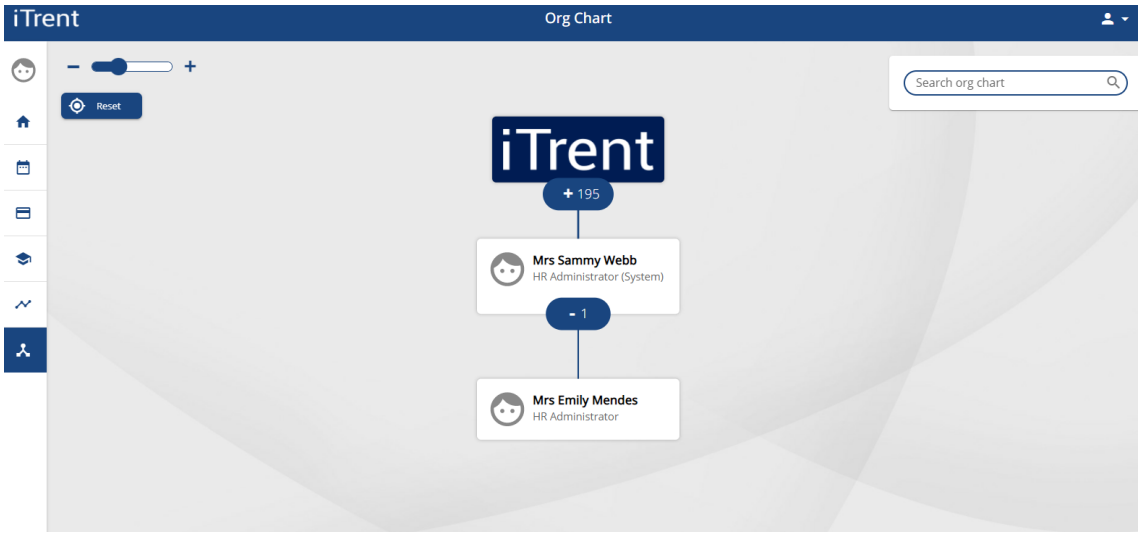
You can amend the filter above to show activities that are at various stages, as detailed in the list. To see everything, select ‘All.’

Org Chart

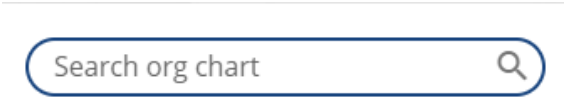


the same named and action as before, this takes you to the Org chart. The org chart graphics looks different in the new ESS.

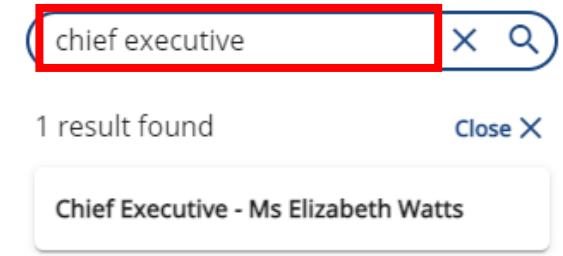
The chart will open up on yourself, and if applicable, anyone who reports to you:



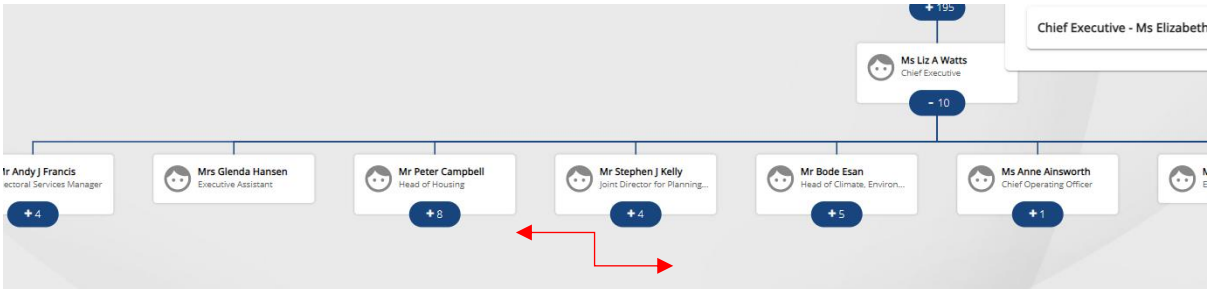
Use the ‘Search org chart’ to open different parts of the org chart.



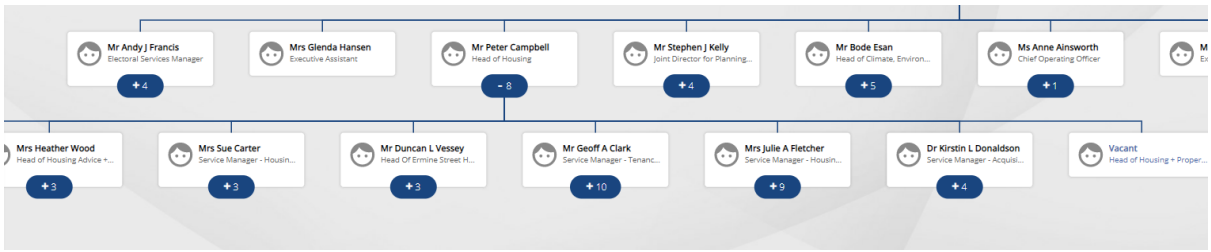
You can search by surname or job title. To take you to the top of the Org chart search for ‘Chief Executive’ and click on the result to open up within the org chart:



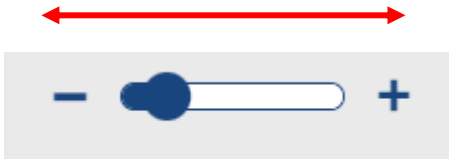
You can click and drag to move across the org chart:

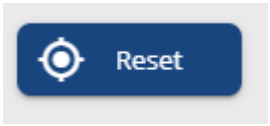


Click on the number tiles to expand and display any staff reporting to managers:



In the top left-hand corner you can zoom in and out of the chart using the toggle:



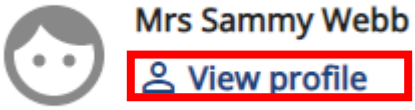
Or to Reset and start again click on 

To come out of the org chart, either select home from the tabs in the left-hand pane,

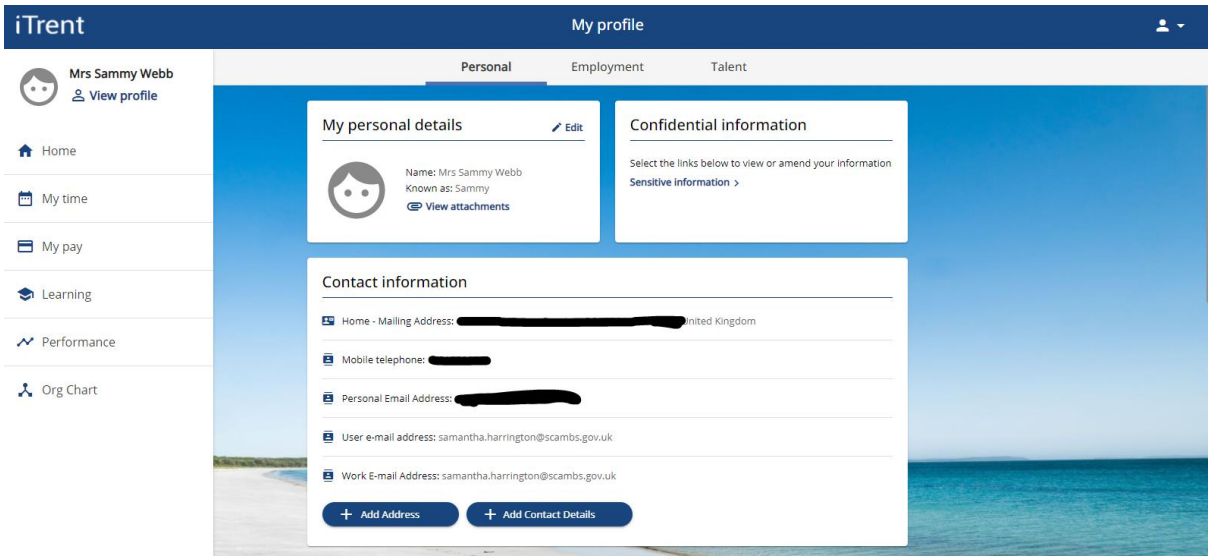
or click on the

logo.

View Profile



click on ‘view profile’ in the top left-hand corner



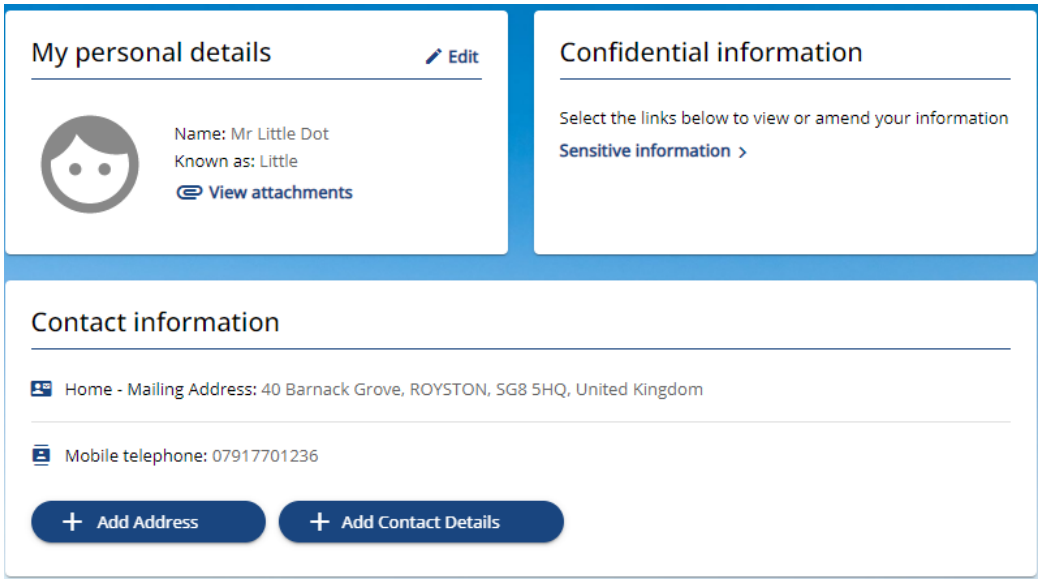
This brings up the ‘**Personal,’ ‘Employment’** and ‘**Talent**’ tabs, (the latter which formerly sat under development in the learning and development tab).

Click across each of the tabs to view each one:

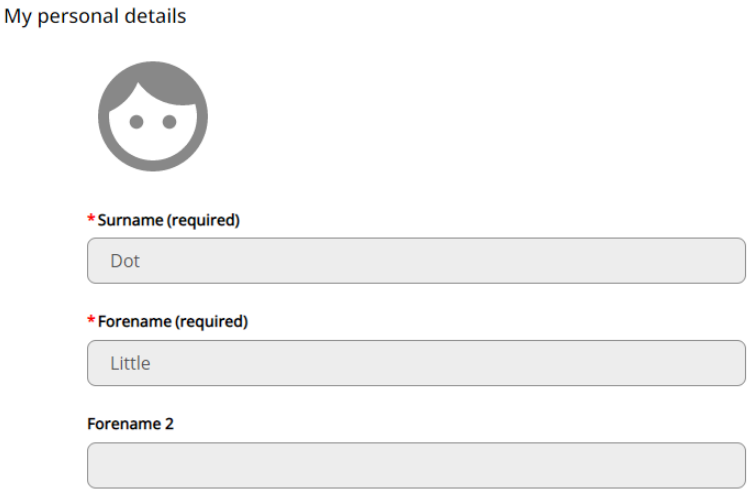
Personal

This tab includes all your personal and sensitive information that you are able to view and amend.

Personal details



On the 'My personal details' tab clicking Edit you can view but cannot amend these details. Details of this nature need to be amended by HR and you would need to contact them with any requirements such as name changes (in the instance of marriage, a marriage certificate will need to be provided to make the change).

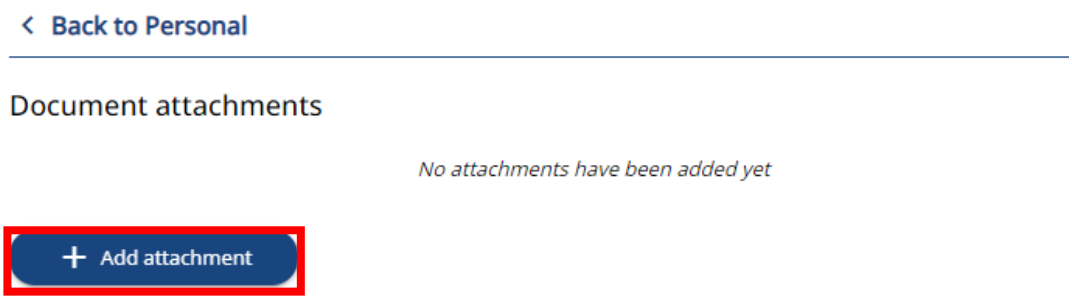


To come out of this, click on Back to Personal

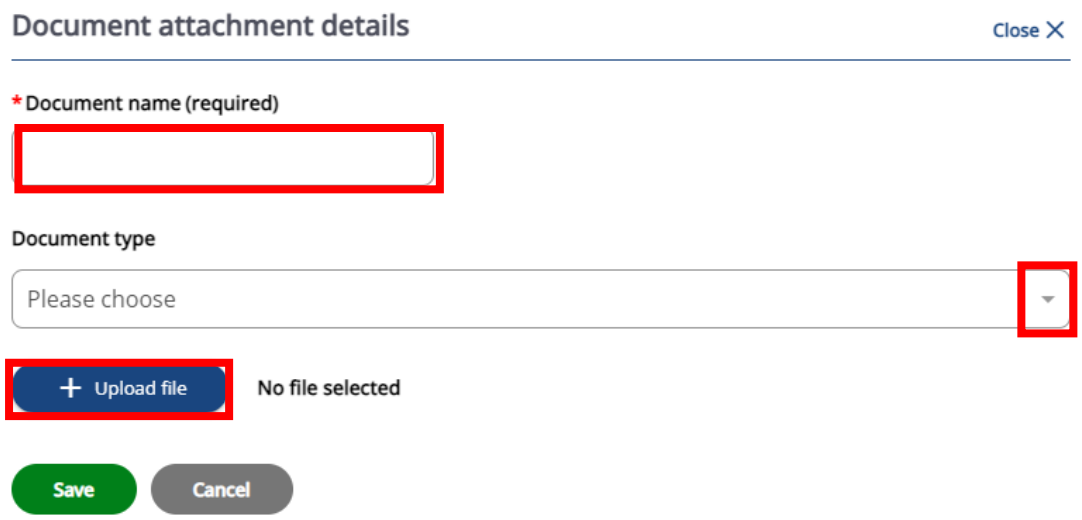
Document attachments

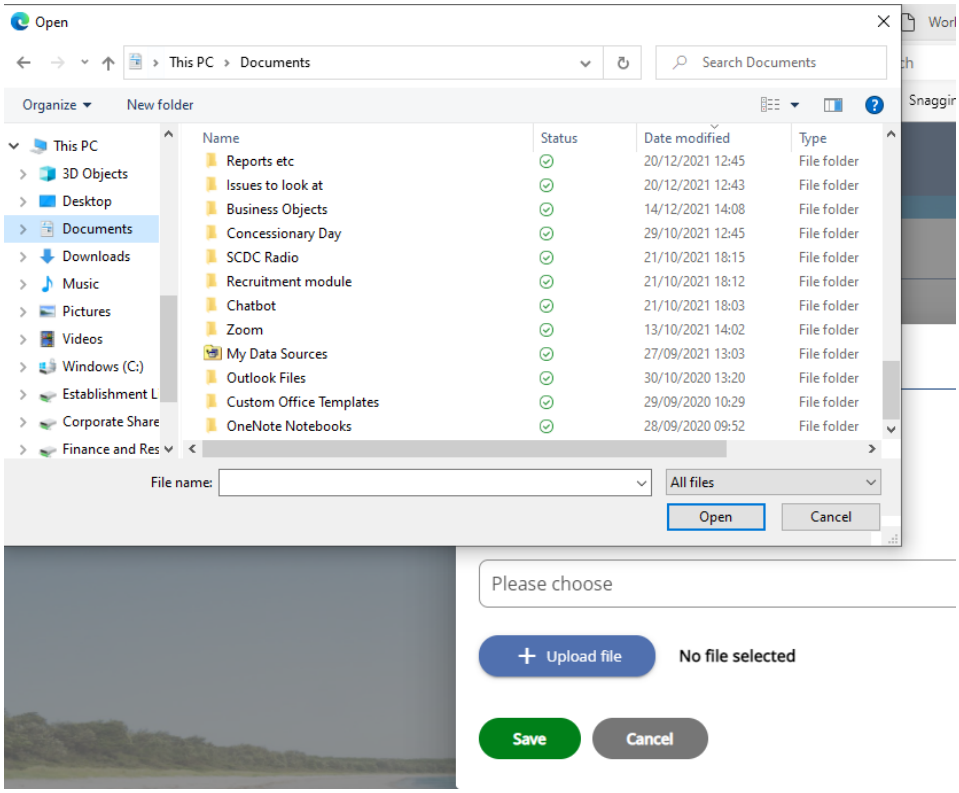
Also within ‘My personal details’, there is a

button. If there are any attachments on your record that you are able to view, these will be visible here. You can also attach any attachments here to your record (such as your marriage certificate, MATB1 form etc.)

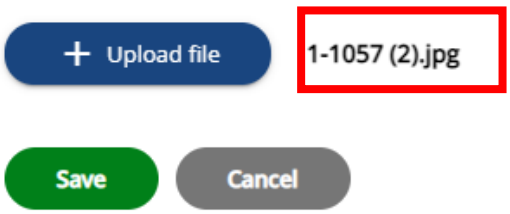


Give the document a name and choose a relevant type from the dropdown option, then click on + upload file to open your documents and find the file to open:





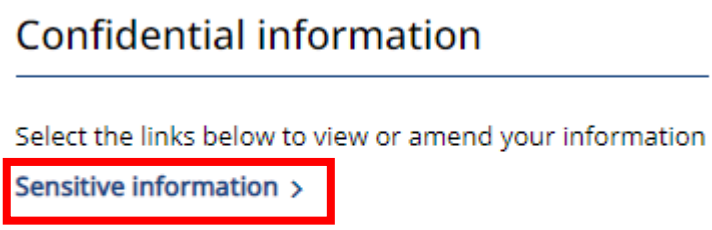
Once selected from your files, it will attach as per this example:



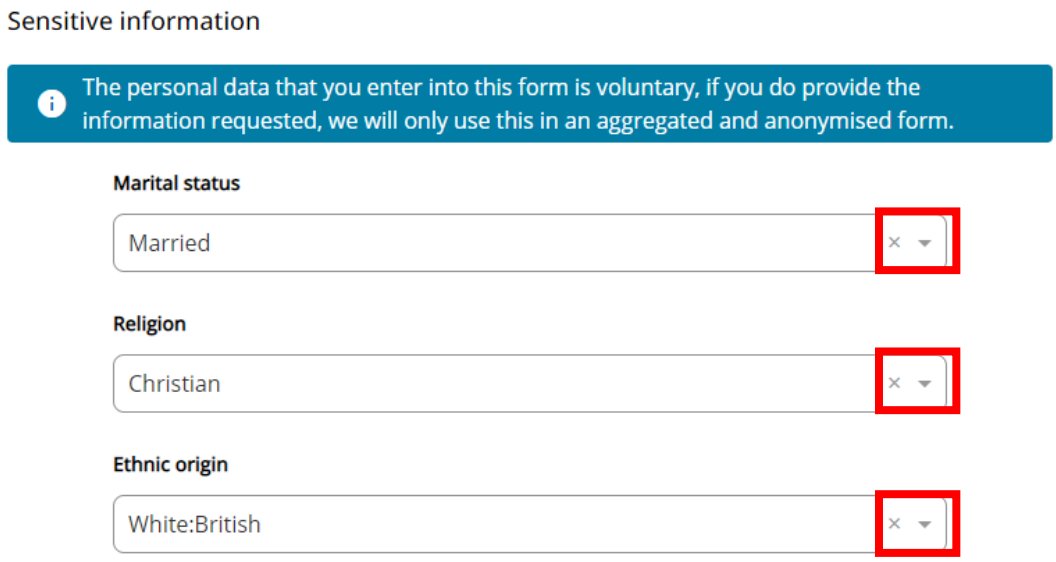
Then click

To come out of document attachments, click

Confidential information

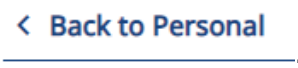


Click on the Sensitive information button to open up the details that are stored. You are able to update these by selecting options from the dropdowns:



Then scroll to the bottom and

any changes you have made.

To come out scroll back to the top and click on 

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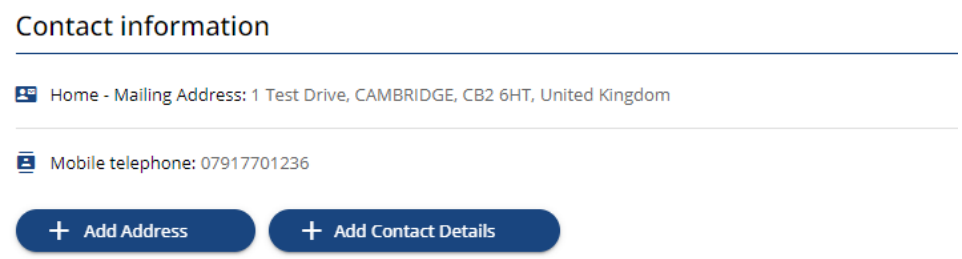
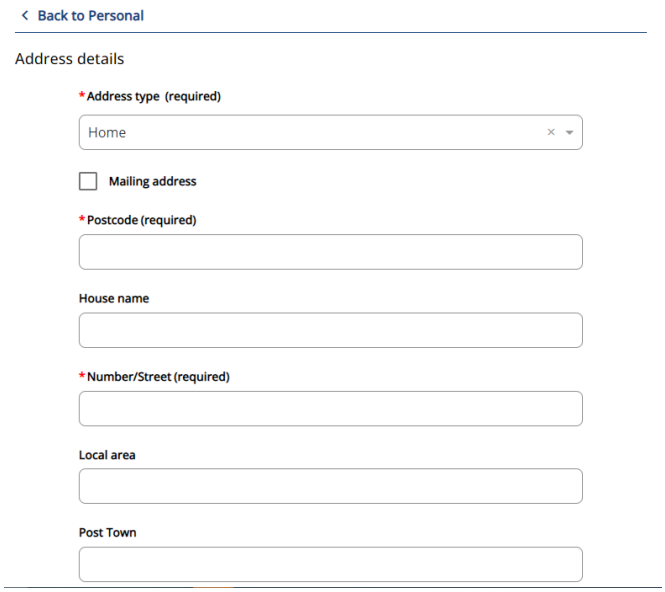
Contact Information



You can update your address or other contact details or add additional details by clicking on

or

Fill in the details (making sure the fields marked * mandatory are filled)



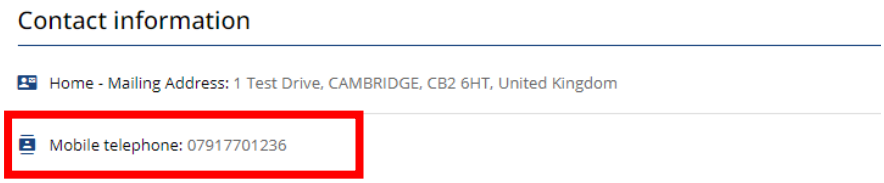
If this is your main address, please tick the

box.

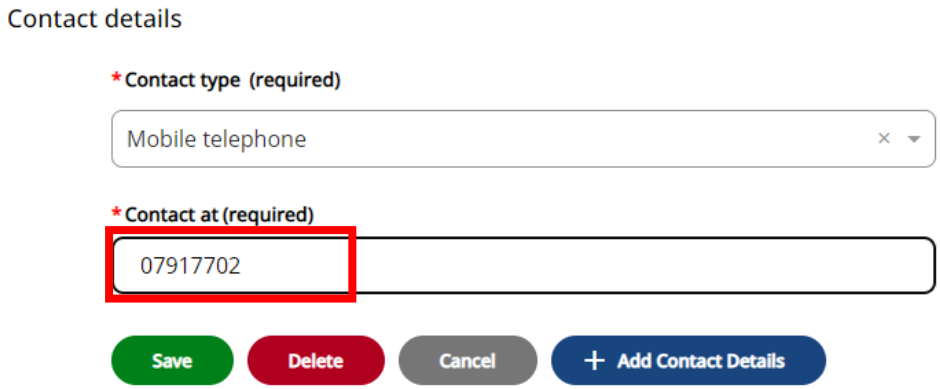
Then scroll to the bottom and **click on 'Save'**

Do Not click '+Add Address' as this will open another blank template.

If an existing one needs to be amended, click on the contact type:



This will open the record and you are able to make any changes:
e.g.



Then click

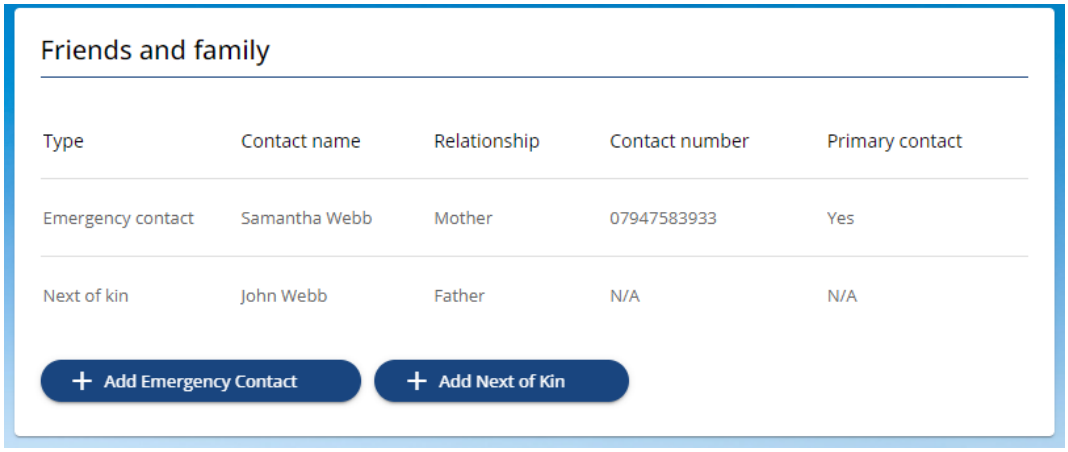
It will confirm

Or if it is no longer in use, such as a mobile number as shown in the example, click on Delete .

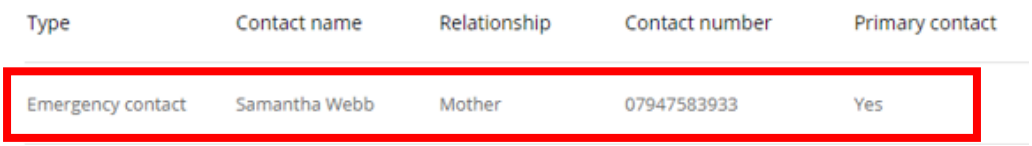
To come out, click on < Back to Personal

Emergency Contact

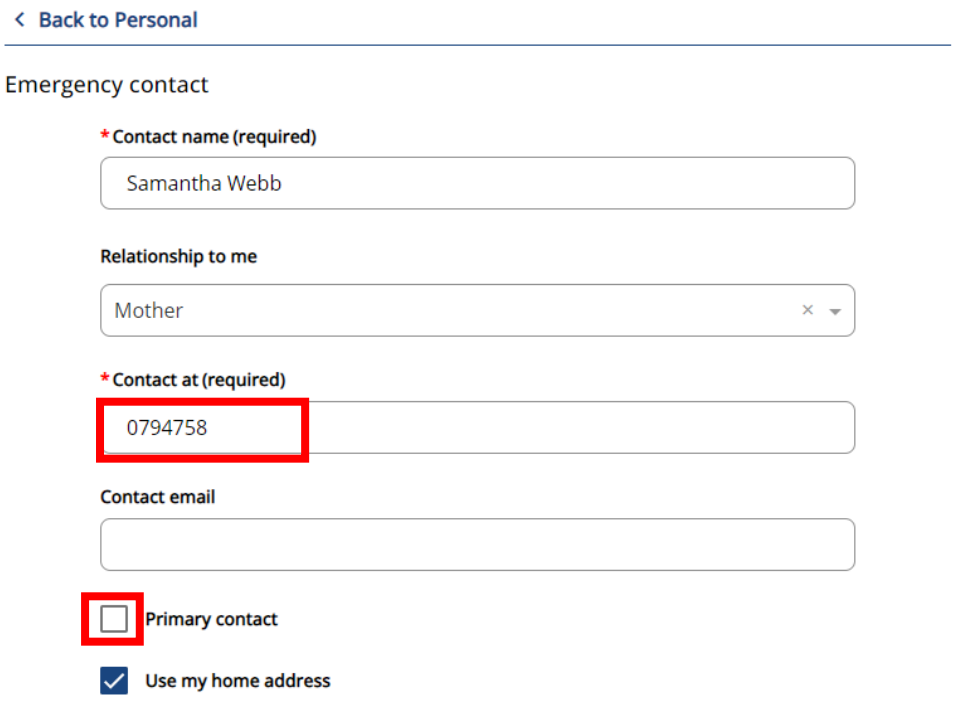
This comes under ‘Friends and family’, where you can also add Next of Kin.



To update the existing emergency contact, click on the contact to open the record:



For your main contact (whether this is your only contact or one of multiple), make sure to tick the ‘Primary contact box’ in this record. Any other details such as the number can also be amended:



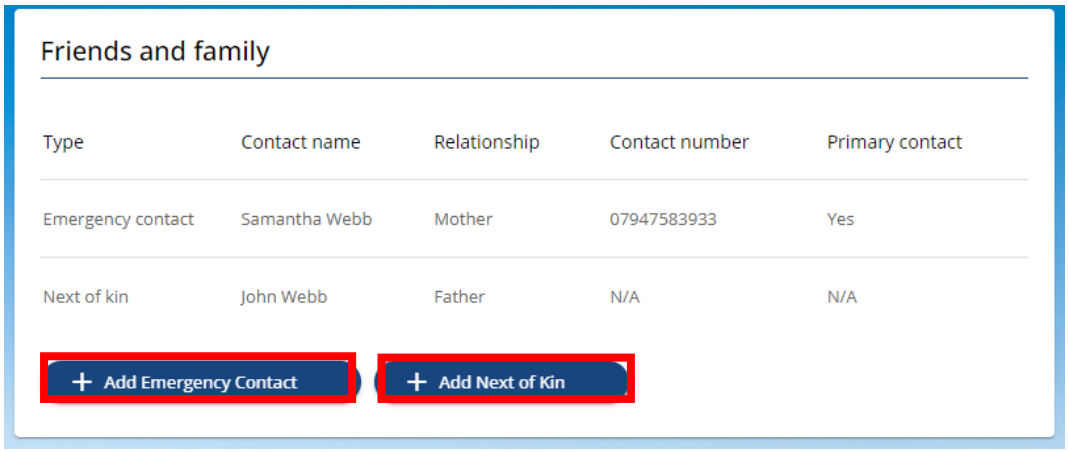
Then scroll to the bottom and click Save .

To add a new emergency contact from here you can select

+ Add Emergency Contact or to remove click on Delete . Please make sure you have at least one emergency contact on your record (as this is for emergency situations and a contact will be needed to get hold of).

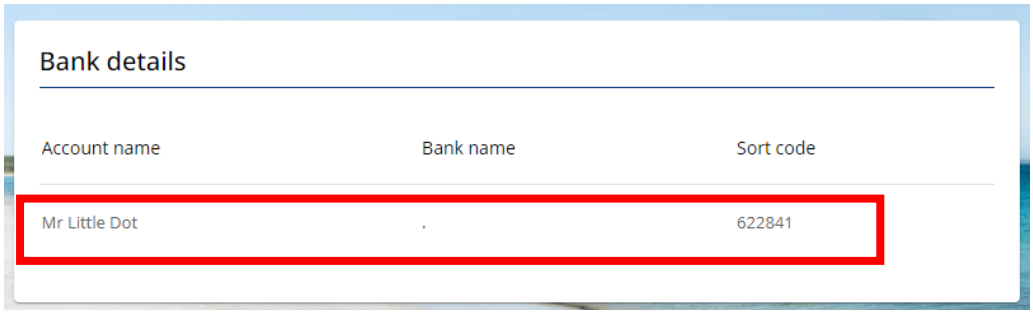
To come out, click on < Back to Personal .

Emergency contacts and next of kin can also be added by clicking on the associated buttons available:

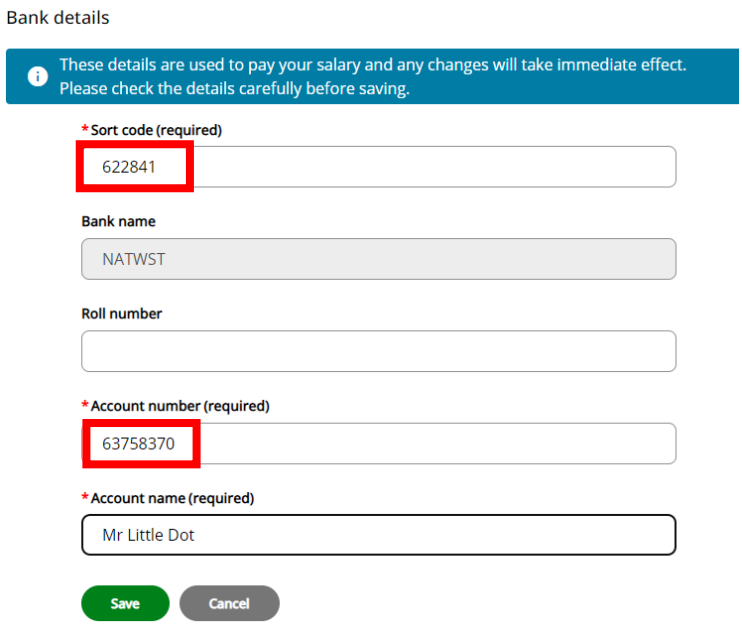


Bank details

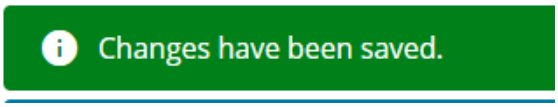
The saved bank details are displayed, but if these have changed please update these as soon as possible before payroll cut off. To update click on the account:



Amend the Sort Code and Account number as required:



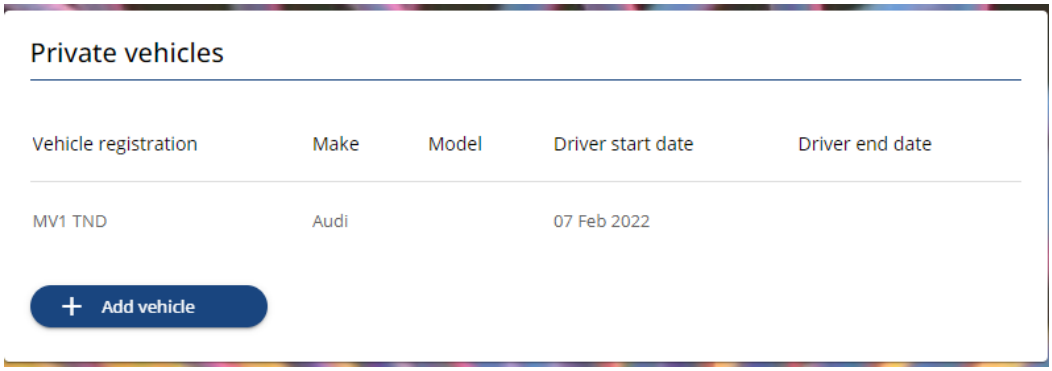
Then click

It will confirm at the top 

To come out, click on

.

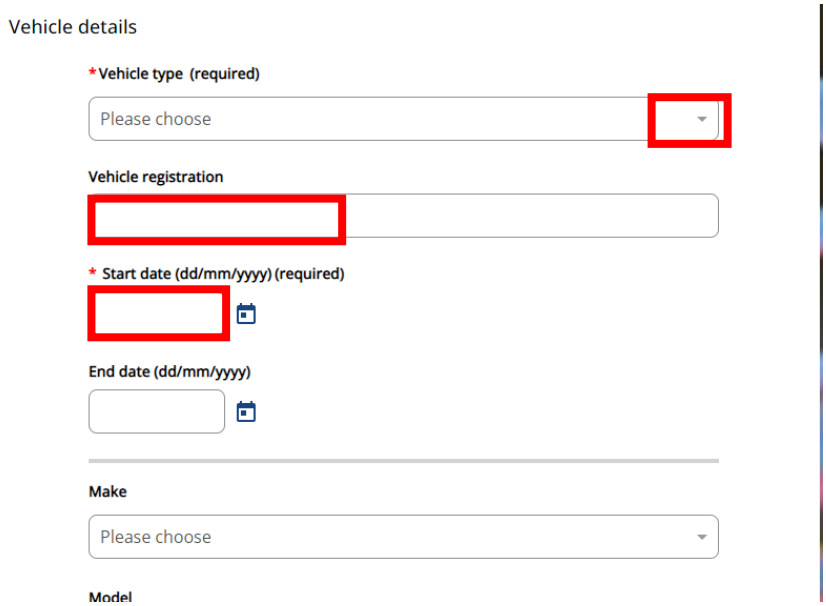
Private vehicle details

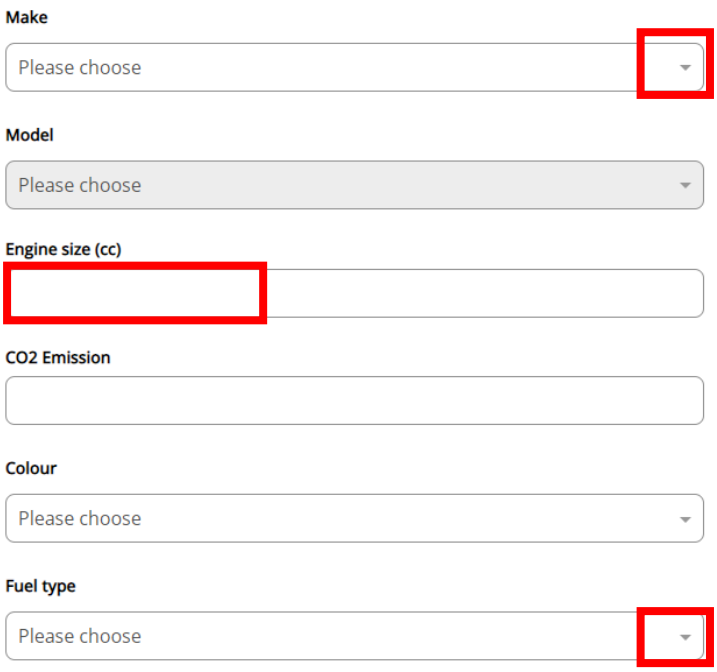


If you have added a vehicle, this will be listed here. If you have not added one and want to claim mileage you must do so here.

Click on

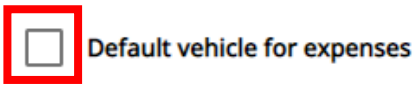
Then enter the vehicle details on the pop - up screen. When entering the start date, make sure it is before the date of the first mileage claim you want to make:



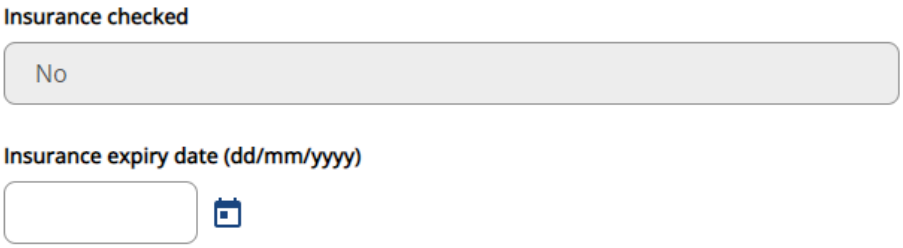


Please note, it is now possible to setup Electric vehicles as your private vehicle, against ‘Fuel Type’.

Make sure to tick ‘default vehicle’ in order to claim against:



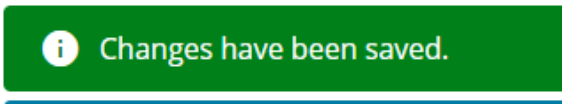
For employees, the insurance needs to be checked by Greyfleet in order to be able to claim for your default vehicle – once this has been confirmed, the insurance checked section of the vehicle details will be populated by HR:



When completed, click

. Do Not Click

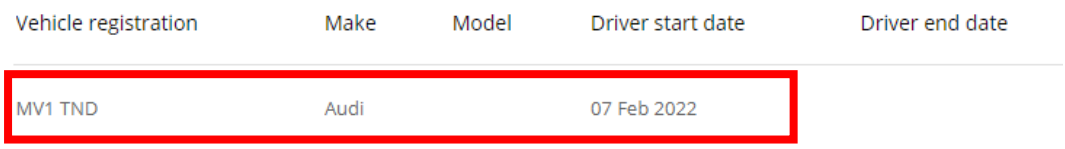
, as this will open a blank template to add another vehicle.

It will confirm at the top 

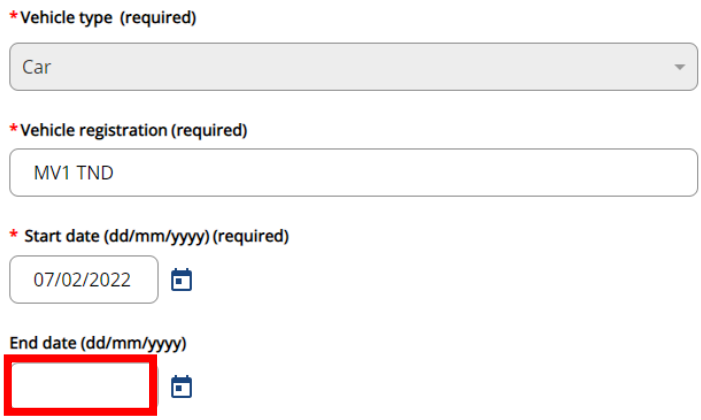
To come out, click on

Vehicle no longer use

If you have a vehicle you no longer use on your record, click on the vehicle to open the record:

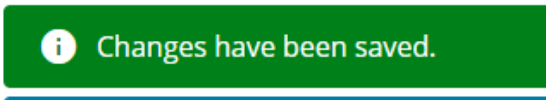


Add an End date to the record:



Then scroll to the bottom and click

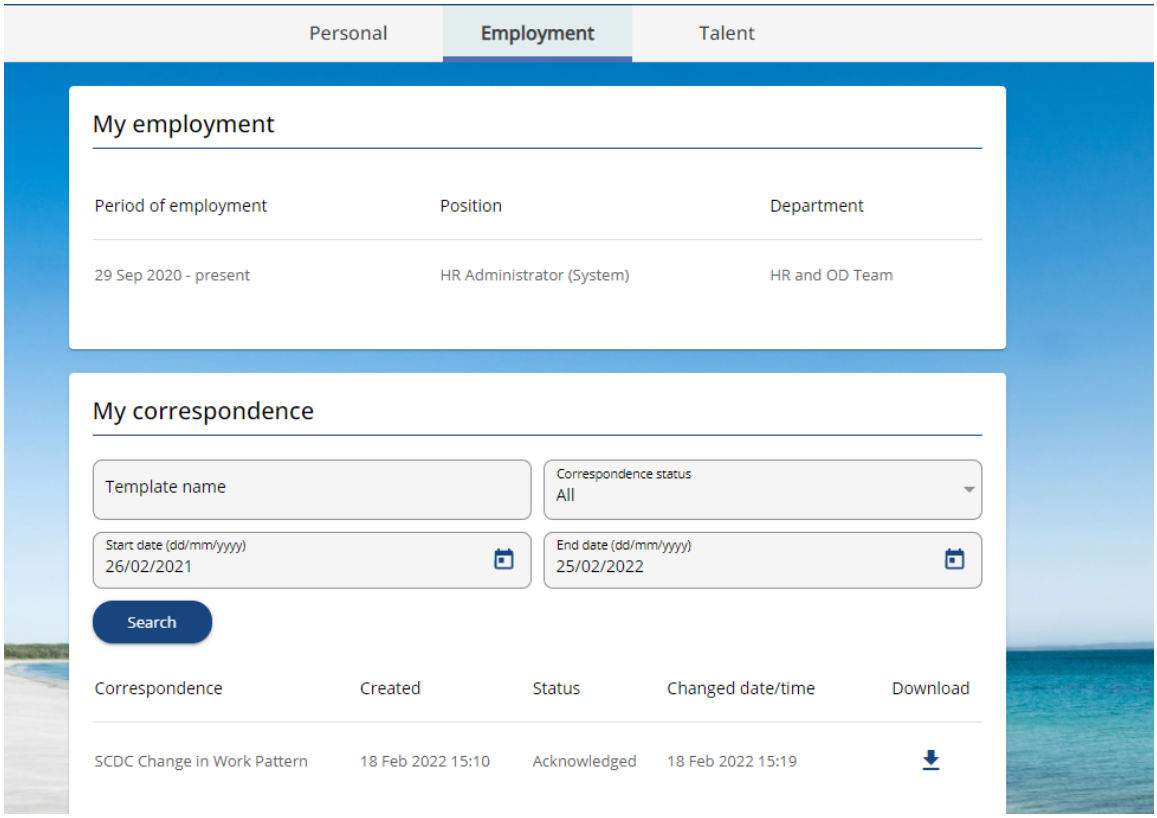
.

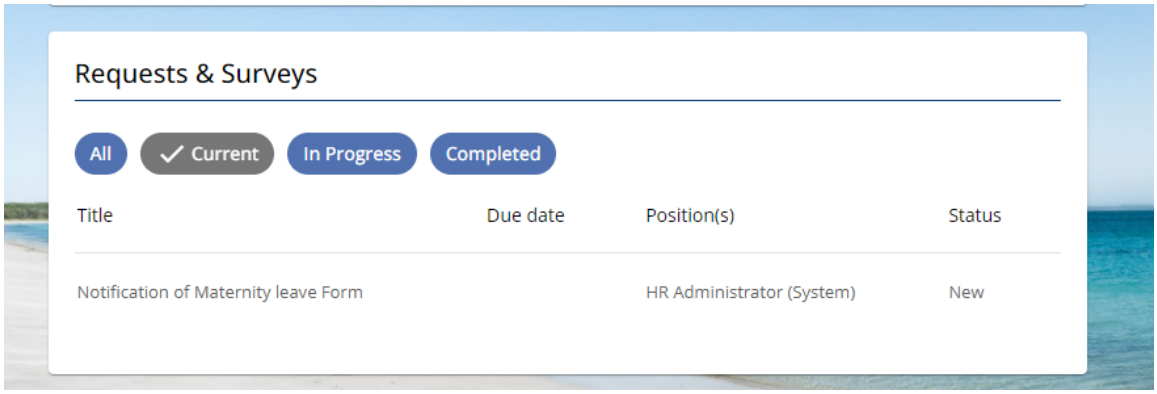
It will confirm at the top 

To come out, click on

.

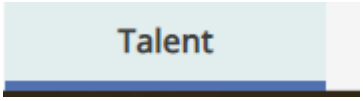
Employment





Employment includes details of your employment history/positions you have been employed in, ‘My correspondence’ where any contract variations or other letters will come to you to be signed in ESS as well as requests and surveys which will have the forms available to complete on ESS that you would usually download form Insite and submit to HR. These are due to go live, and you will receive further guidance for using these features.

Talent

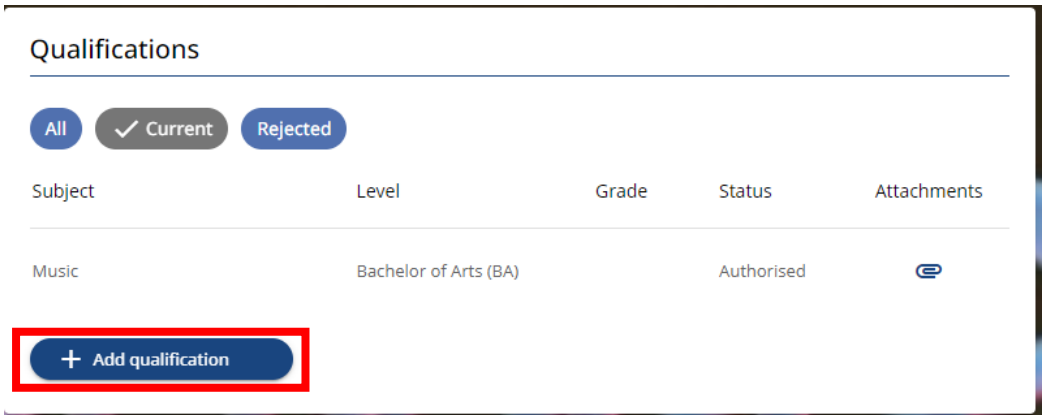
The 

tab is where you can add any qualifications, memberships and skills.

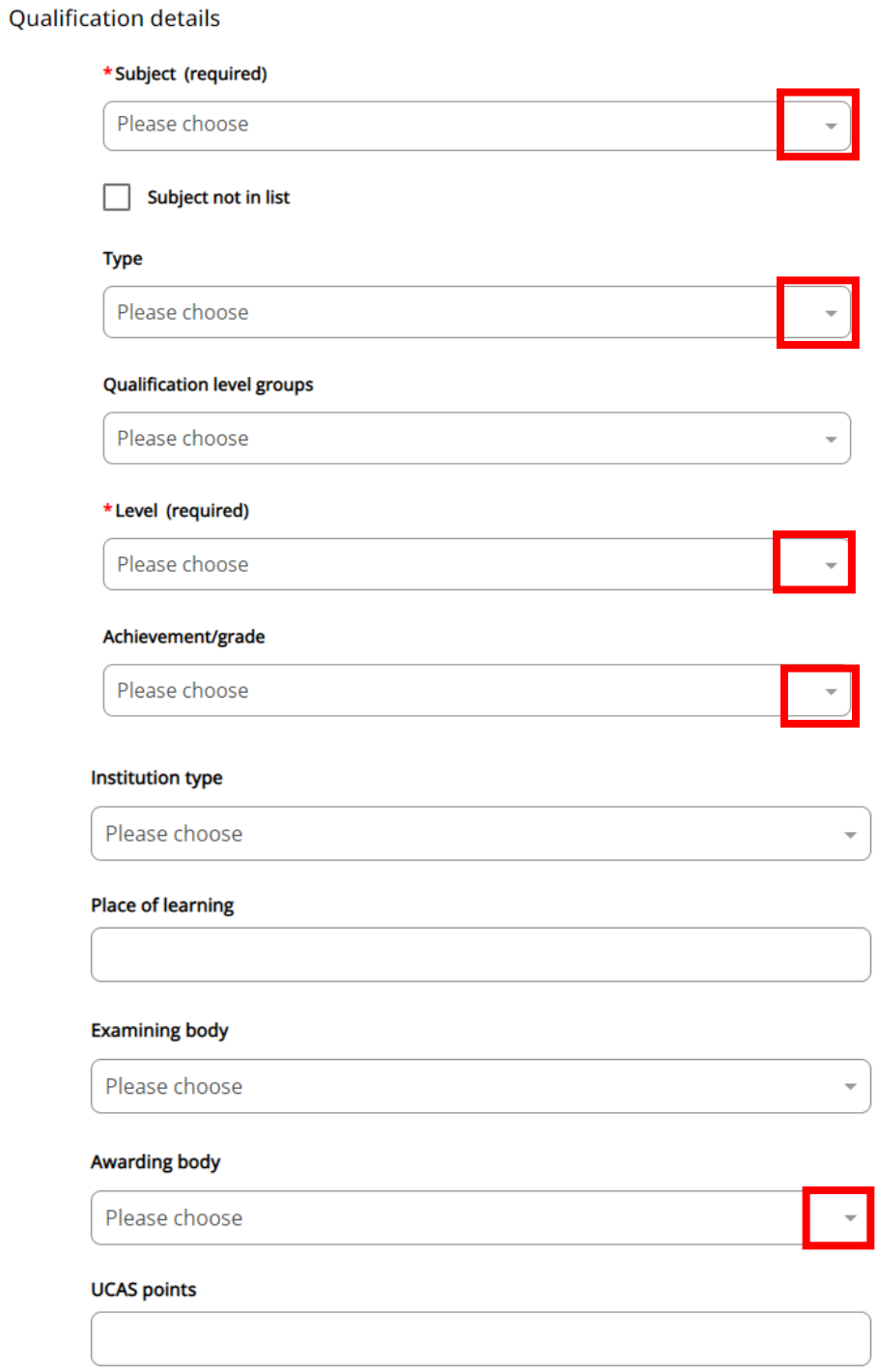
Any you have already added will be listed within the tab, but each has an ‘+’ button option.

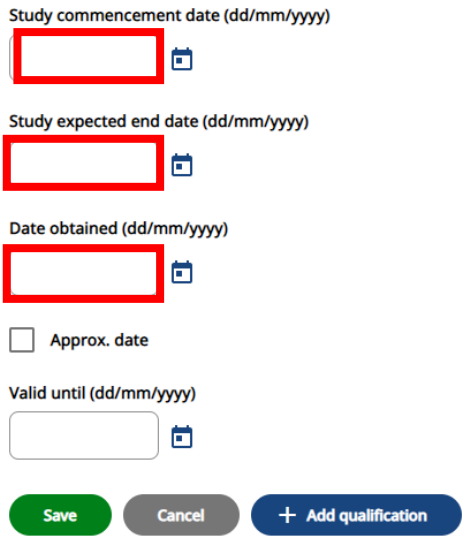
Qualifications

To add a qualification, click on the add qualification button:



Fill in the information using the dropdowns, fields and tick boxes available, and where applicable:





If the subject is not listed, or other fields require any additions to select from please contact the HR System Analyst to have this added.

When completed click

. Do Not Click

as this will open a blank template to complete.

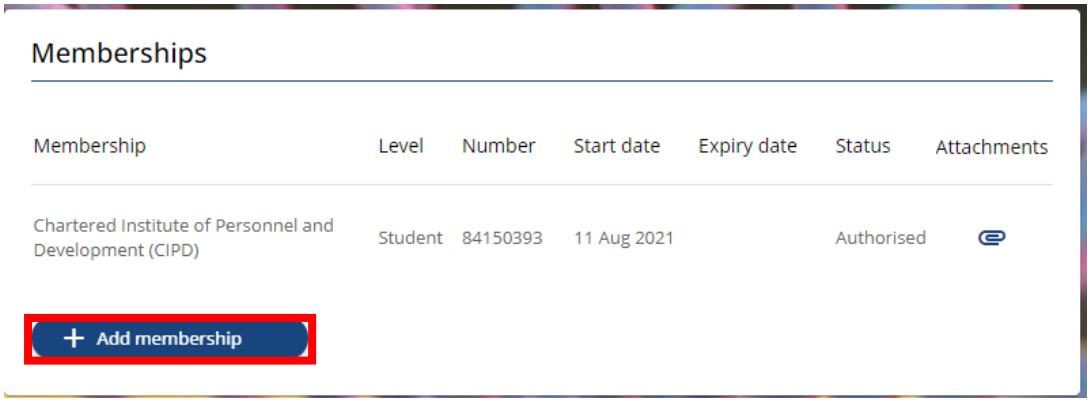
From here, you can continue to add further qualifications by clicking on the

button.

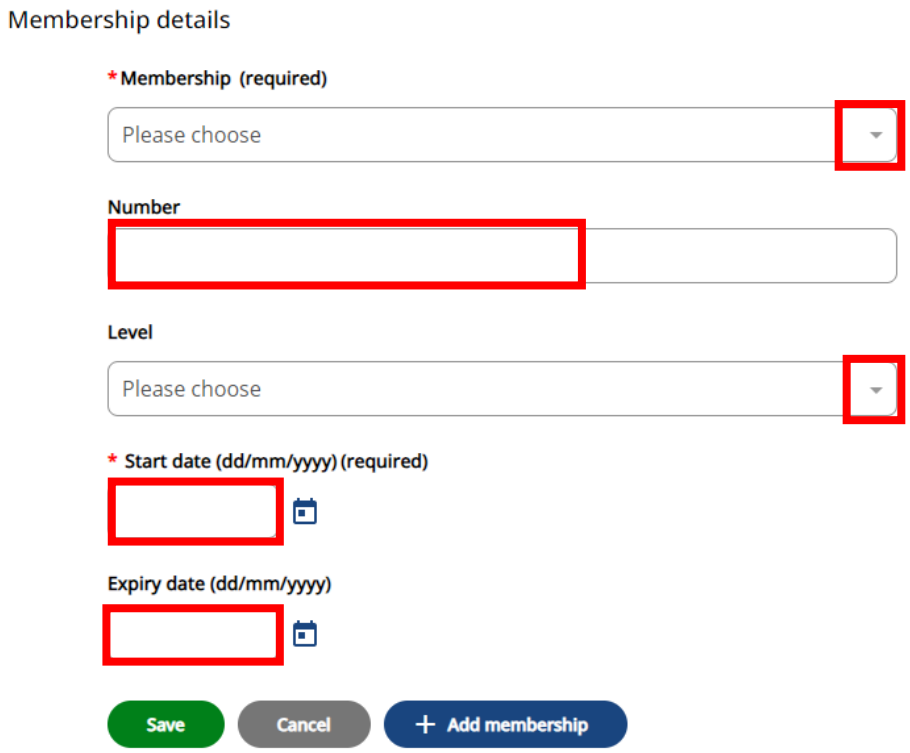
To come out, click on

.

Memberships

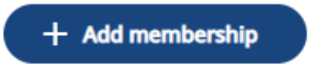


Fill in the information using the dropdowns, fields and tick boxes available, and where applicable:



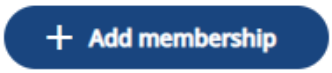
If the Membership is not listed, or other fields require any additions to select from please contact the HR System Analyst to have this added.

When completed click

. Do Not Click 

as this will open a blank template to complete.

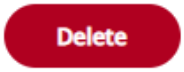
From here, you can continue to add further qualifications by clicking on the



button.

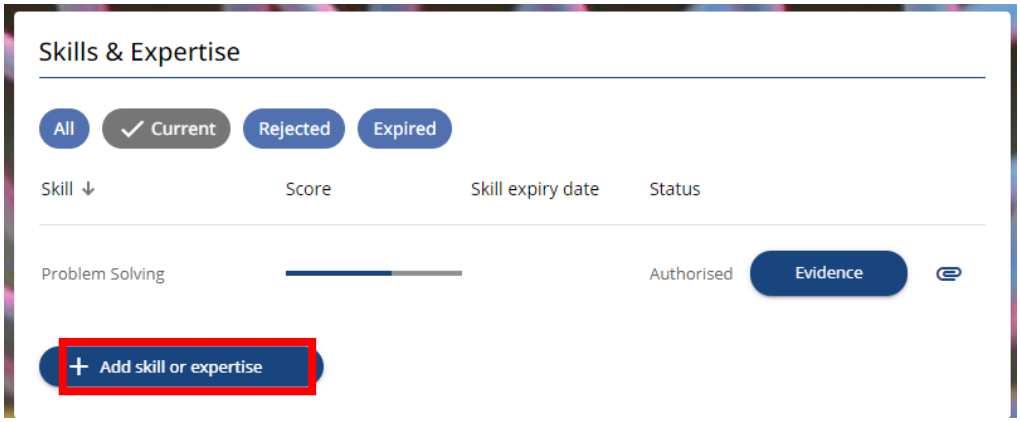
To come out, click on

To delete a membership click on the Membership required:

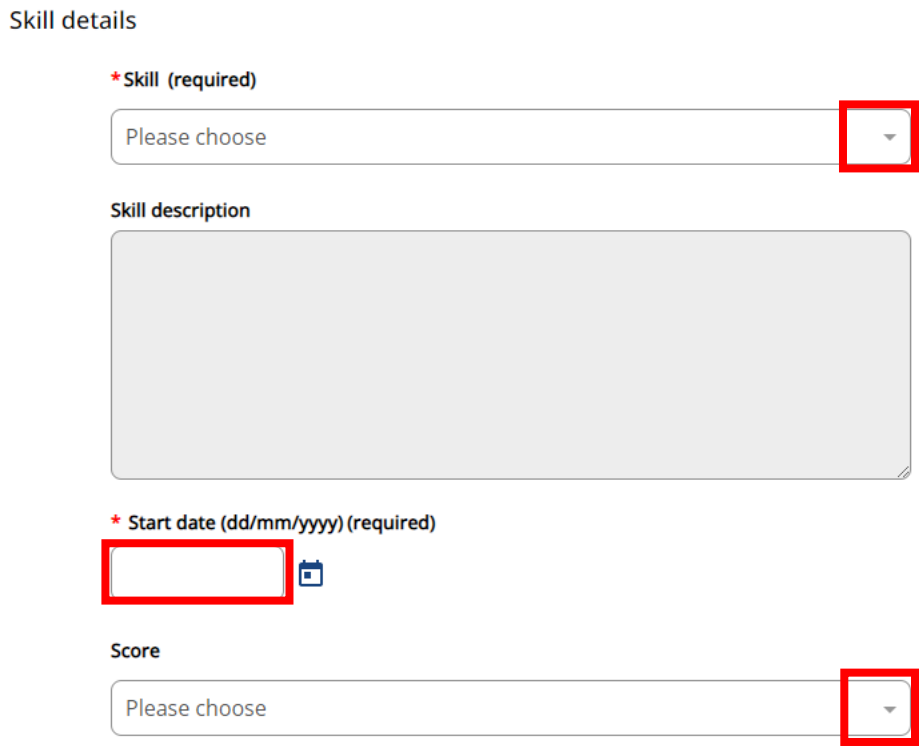
Once the record is open, click 

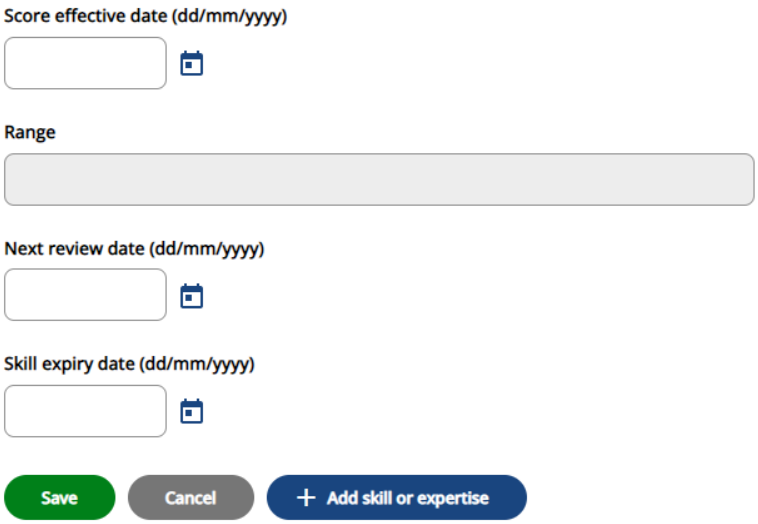
at the bottom.

Skills & Expertise



Fill in the information using the dropdowns, fields and tick boxes available, and where applicable:





The skill description will auto-populate where applicable.

If the Skill is not listed, or other fields require any additions to select from please contact the HR System Analyst to have this added.

Score Key

0 None

1 Developing

2 Novice

3 Competent

4 Proficient

5 Expert

When completed click

. Do Not Click

as this will open a blank template to complete.

From here, you can continue to add further qualifications by clicking on the

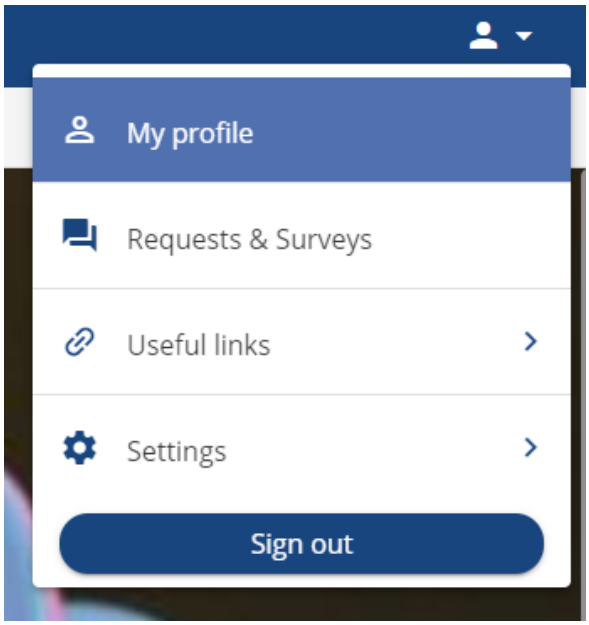
button.

To come out, click on

.

Utility menu

in the top right-hand corner.



My Profile takes you to your profile as detailed above.

Requests & Surveys will be detailed in later guidance when we use questionnaires and correspondence.

Useful Links –

SCDC Job opportunities take you to internal recruitment page.