



North Lanarkshire Council



Managers Guidance - Time & Attendance

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Document Owner(s):

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|---------------------|------|---|
| ESC People Helpdesk | | <p>If you need further support - For staff live on myNL Portal - Please raise a People Helpdesk General Enquiry request form.</p> <p>For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk</p> |

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Overview

This guide will explain to you how to view and manage your employee's flexi recording and booking using myTeam.

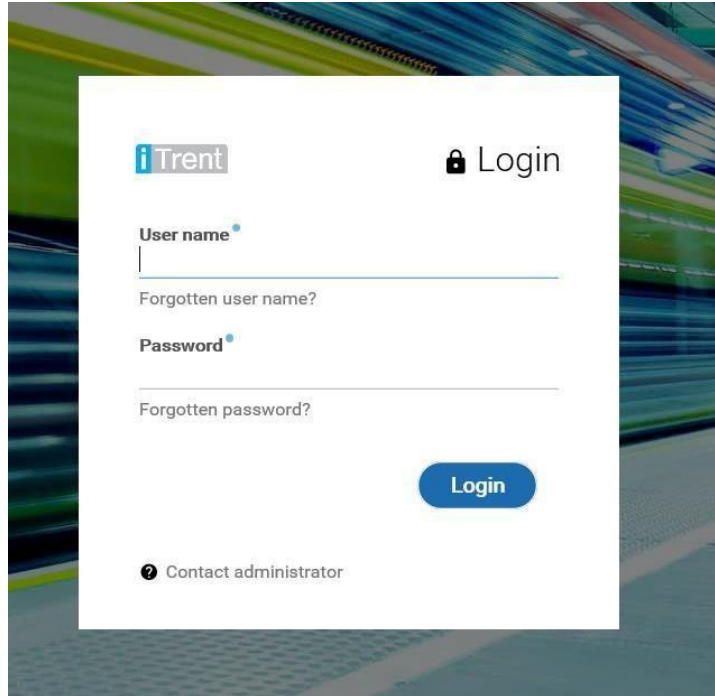
We hope that you find this guide useful. If you have any issues or difficulties when trying to retrieve information regarding your employee's flexi, If you need further support –

For staff live on myNL Portal - Please raise a [People Helpdesk General Enquiry](#) request form.

For staff not yet live - Please email ESC-HelpDeskTeam@northlan.gov.uk

1. Logging in

Go to https://ce0076li.webitrent.com/ce0076li_web/wrd/run/etadm001gf.open and log in.



The screenshot shows the iTrent Login page. At the top left is the iTrent logo. To the right is a lock icon followed by the word 'Login'. Below this are two input fields: 'User name' and 'Password'. Each field has a 'Forgotten' link below it. A blue 'Login' button is positioned below the password field. At the bottom left, there is a link that says 'Contact administrator' with a question mark icon.

Your employee number is your username. *If you are having difficulty logging into your myTeam account, please click 'Contact administrator' for further guidance.*

Once you have logged in, select the 'People' and select the employees record you wish to view at the left-hand side:





2. Flexi Recording

2.1 Viewing an Employees Flexi Details

It is an employee's responsibility to record their flexi details each day they are working. To view their recorded times, please select the absence tab:

The screenshot displays the 'Absence' tab in the Employee Service Centre. At the top, there is a 'Calendar' section for the period 27 Apr - 10 May 2022, with a 'VIEW FULL CALENDAR' link. To the right, two circular gauges show 'Holidays remaining (as of last calculation)' at 45.2 of 336.7 hours and 'Flexi Balance' at 05:37 hours. Below these, a 'LINKS' section contains several buttons: 'Personal Details', 'Employment', 'Employee Annual Leave', 'Employee Sickness Absence', 'Employee Other Absence/Flexi Leave' (selected), 'Employee Maternity/Paternity/Adoption Absence', and 'Vehicle Info & Mileage, OT & Expenses Claims'. A 'myTeam Guide to Flexi Leave' section includes links for '1. Add Other (Special) Leave', '2. View/Edit Other (Special) absence details', '3. Run Absence report', and '4. Download Absence report'. The '2. View/Edit Other (Special) absence details' link is highlighted in yellow.

Within the above screen you can also see an overview of the employees flexi balance within that current flexi period.

Flexi – An employee will use the Flexi function when recording their hours worked. If an employee has accrued enough time for a half or full day flexi leave, they will book their flexi leave using the drop down and selecting 'Booked'. This request will be sent to the manager for action.

Please note

- *Flexi leave (half/full day leave) is only entitled to staff who do not work a smarter working pattern.*
- *An employee can only carry over a maximum of 7 hours into the next flexi period (pro rata'd for part time employees).*
- *30 minutes will be deducted from an employee time worked if they do not clock out for a lunch break and have worked more than 6 hours that day.*

3. Flexi Adjustments

3.1 Creating a flexi adjustment for a reportee

To create a flexi adjustment to an employee's flexi record, please select the absence tab >Make a Flexi Adjustment:

Calendar

VIEW FULL CALENDAR

27 Apr - 10 May 2022

27 28 29 30 01 02 03 04 05 06 07 08 09 10

● ● ● ● ● ● ● ● ● ● ● ● ● ●

1 Jan 2022 - 31 Dec 2022

45.2 of 336.7 hours

Holidays remaining (as of last calculation)

25 Apr 2022 - 22 May 2022

05:37 hours

Flexi Balance

LINKS

[Personal Details](#)
[Employment](#)
[Employee Annual Leave](#)
[Employee Sickness Absence](#)

[Employee Other Absence/Flexi Leave](#)
[Employee Maternity/Paternity/Adoption Absence](#)

[Vehicle Info & Mileage, OT & Expenses Claims](#)

[Manager's Special Leave Guidance](#)
[How to authorise Other \(Special\) Leave on myTeam](#)
[COVID 19 Absence Procedures](#)

[Long Covid Guidance](#)
[1. Add Other \(Special\) Leave](#)
[2. View/Edit Other \(Special\) absence details](#)
[Coreless flexi Guidance](#)

[myTeam Guide to Flexi Leave](#)
[1. Make a Flexi Adjustments](#)
[2. View/Amend Employee Flexi Details](#)
[3. Run Absence report](#)

[4. Download Absence report](#)

SEARCH FIND ITRENT PAGES

ORGANISATION

North Lanarkshire Council

PEOPLE

Results 3 People

Surname

Select all Save this group

Miss Minnie Mouse

FLEXTIME LIST

Show all

15/02/2022 08:37 Record

31/01/2022 Brought forward

31/01/2022 Lost

Miss Minnie Mouse

Flexitime adjustment New MENU

Adjustment date* 25/04/2022

Adjustment value (minutes)* 120

Position* Customer Service Support Officer (C

Flexi adjustment

Note

SAVE

A manager will only have the access to create an adjustment to their reportees record. You also have the option to create a note as to why the adjustment has been made.

An adjustment should be entered as a total number of minutes, for example for an adjustment of 2 hours you should enter 120 minutes.

An adjustment can be made to either credit or deduct time (minus input before the value as shown in description) if necessary.

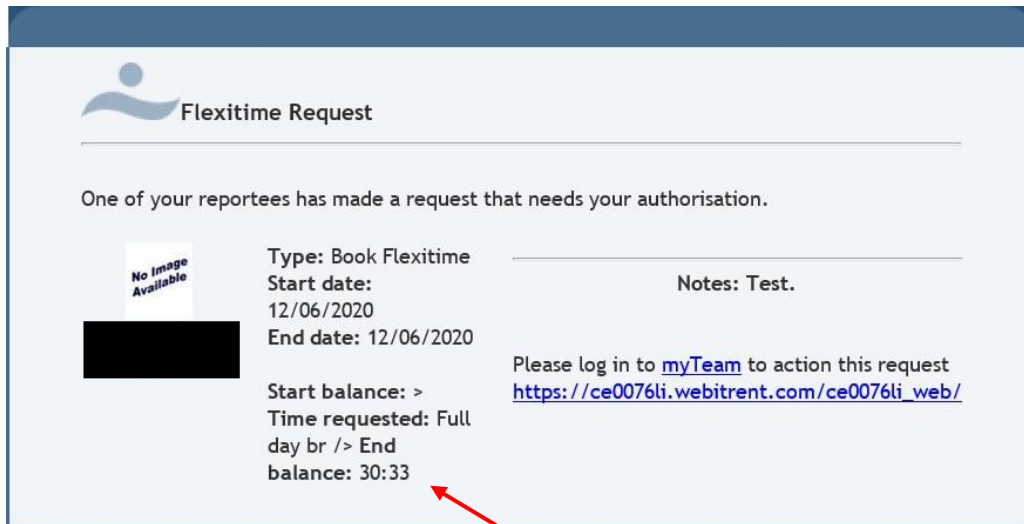
This is also where you will create the one time flexi adjustment of the transfer of the balance from the Etarmis system.

4. Email Alerts

You will receive the following email alerts to notify you when:

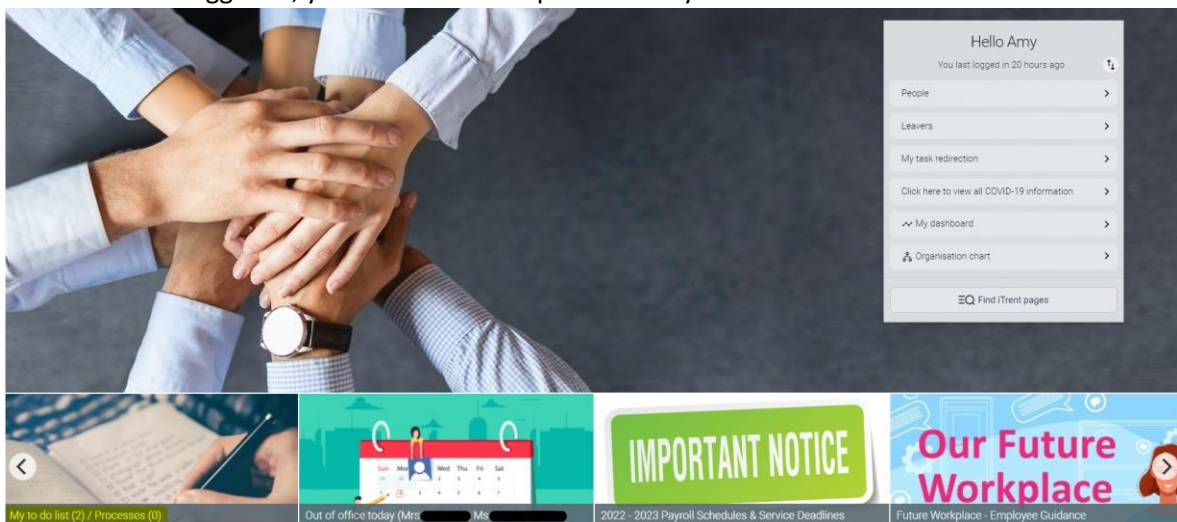
- An employee has requested to use their accrued flexi time. This could be a full day flexi or half day flexi leave.
- An employee has not recorded their workings hours for a day. This will be sent at the end of the week.

An example of a flexi request alert:



You will be able to see at a glance an employee's current balance.

To action the alert, please follow the link within the email which will take you direct to your myTeam account. When logged in, you will find the request within your to do list:



Once you have selected the request within your to do list > the

ACTIONS

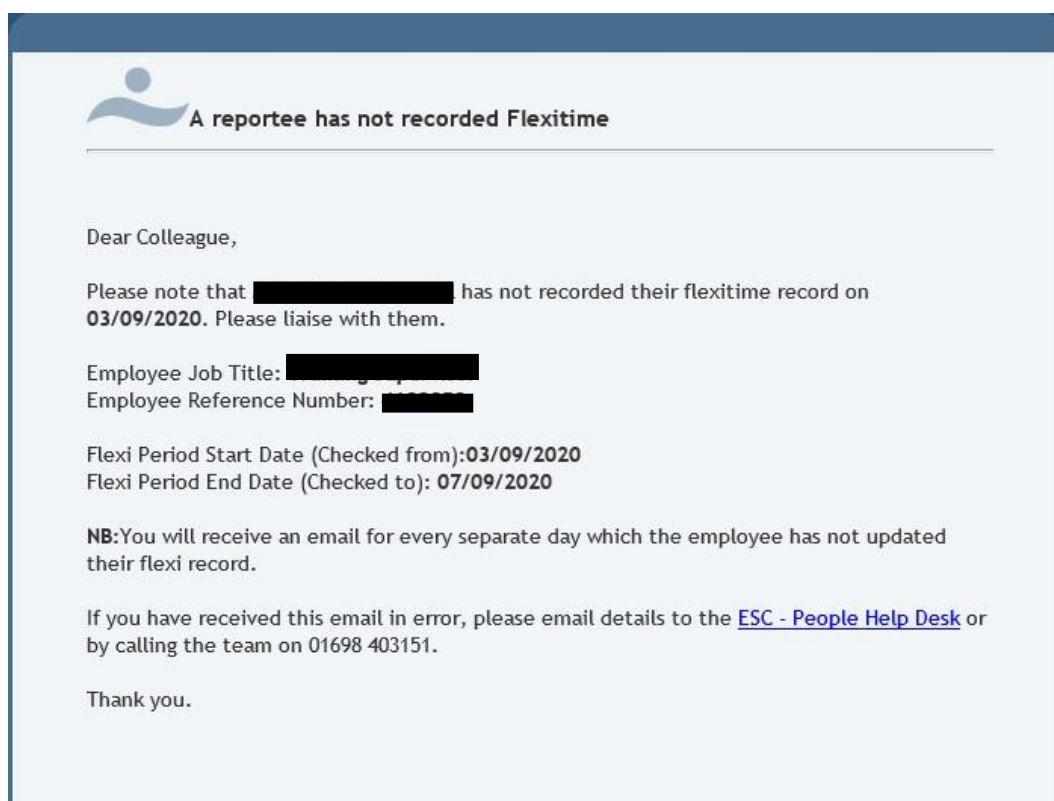
select (at the top of

list) > ☐ Authorised ☒ Not authorised you will then be given the option to authorise or reject the request. The employee will be notified via email of the outcome.

Employees who have not clocked in/out

Email alerts are also system generated to run on a Friday evening each week, advising the reporting manager of what dates were missed. The system will generate a separate email for each date an employee has not recorded flexi (and who were not on authorised leave).

An example of a missing flexi record alert:



You will receive a separate email for each employee that falls into this category (i.e. have not recorded their working times).

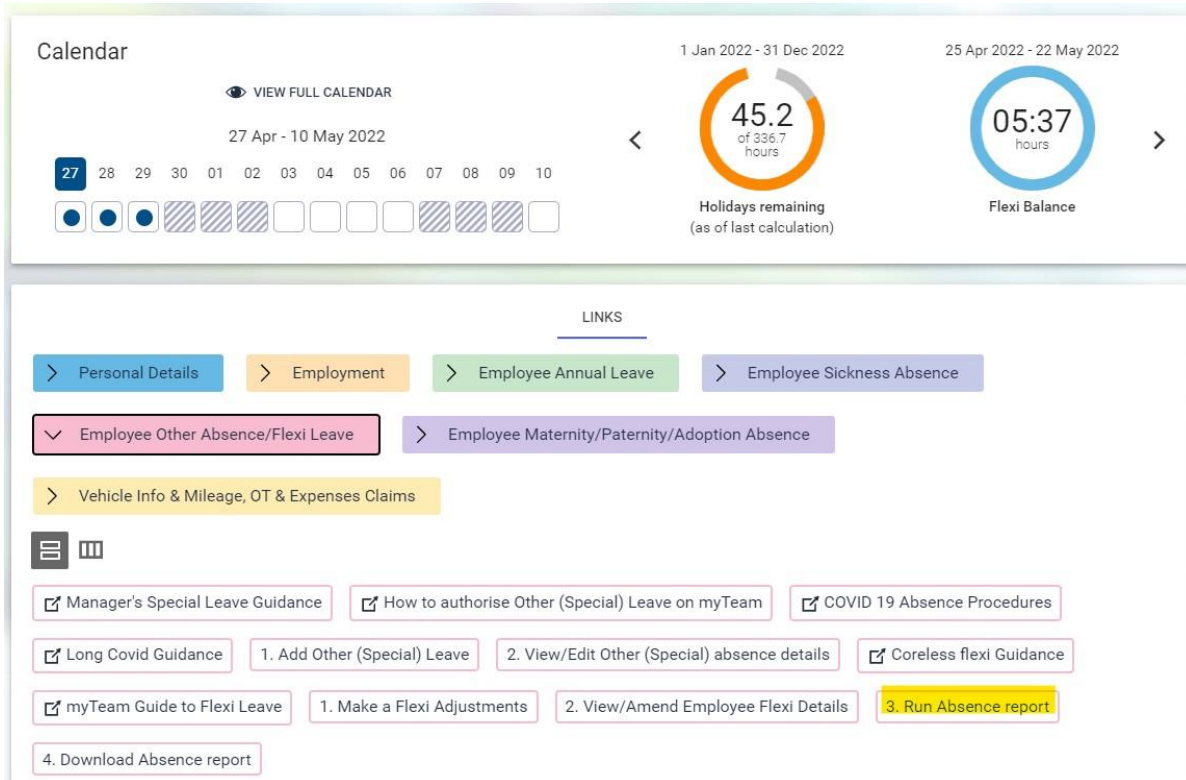
This should be discussed with the employee and advise them that they are required to input the missing recordings retrospectively.

5. Reporting

Managers can also now run three distinct flexi reports as and when required for either an individual or for the whole team. These reports are: **Flexi Balances**, **Flexi History** or **Missing Flexi records**.

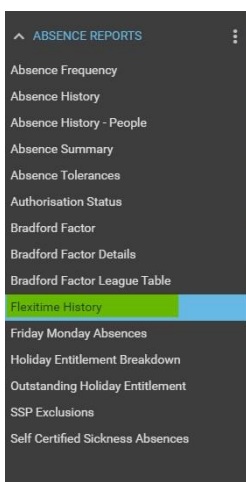
5.1 Running a Flexitime Report

To run a report on an employee's flexi record, within the employees record, select "Employee Other Absence/Flexi Leave" and then select "Run Absence report"



The screenshot shows the Employee Service Centre interface. At the top, there is a 'Calendar' section with a date range of '27 Apr - 10 May 2022'. Below the calendar, there are two circular gauges: 'Holidays remaining (as of last calculation)' showing 45.2 of 336.7 hours, and 'Flexi Balance' showing 05:37 hours. Below these, there is a 'LINKS' section with several buttons: 'Personal Details', 'Employment', 'Employee Annual Leave', 'Employee Sickiness Absence', 'Employee Other Absence/Flexi Leave' (selected), 'Employee Maternity/Paternity/Adoption Absence', and 'Vehicle Info & Mileage, OT & Expenses Claims'. Below the links, there is a list of guides and reports: 'Manager's Special Leave Guidance', 'How to authorise Other (Special) Leave on myTeam', 'COVID 19 Absence Procedures', 'Long Covid Guidance', '1. Add Other (Special) Leave', '2. View/Edit Other (Special) absence details', 'Coreless flexi Guidance', 'myTeam Guide to Flexi Leave', '1. Make a Flexi Adjustments', '2. View/Amend Employee Flexi Details', '3. Run Absence report' (highlighted), and '4. Download Absence report'.

From the list provided on the left-hand side, select 'Flexitime History'



The screenshot shows a sidebar menu titled 'ABSENCE REPORTS'. The menu items are: 'Absence Frequency', 'Absence History', 'Absence History - People', 'Absence Summary', 'Absence Tolerances', 'Authorisation Status', 'Bradford Factor', 'Bradford Factor Details', 'Bradford Factor League Table', 'Flexitime History' (highlighted), 'Friday Monday Absences', 'Holiday Entitlement Breakdown', 'Outstanding Holiday Entitlement', 'SSP Exclusions', and 'Self Certified Sickness Absences'.

To run a report on all employees that report to you on MyTeam or an individual employee, follow the steps shown below:



Unit = all employees that report to you

Employee= individual report
(employee name or number for individual employees required)

Select the report you would like to run:

Balances, History or *Missing flexi records

Select the effective date.

Please note, some reports will ask you for an effective date to and from.

Select the output type.

PDF File or CSV File (Excel)

Balances – show all your reportee(s) current flexi balance

History – show all your reportee(s) flexi history

Missing Flexi Records – show each work day date that your reportee(s) has not recorded flexi.

All 3 reports will return information based on the dates you select the date fields.

New Page for each organisation unit – if ticked, this will ensure that units/employees have a separate page for each individual.

*Please note, for the Missing Flexi Records report, when in 'Unit' you must do a search for the appropriate 'Organisation Start Point', i.e. search for your specific unit that you/your reportees work in. (See the example on the next page).




This level of search is only required for missing flexi records report. Balance and history reports do not require this level of searching.



Flexitime History

Flexitime History

MENU




Unit/Employee

Unit

Organisation start point

People & Organisational Development




Report type

Missing flexi records


Record from

28/07/2020



Record to

28/07/2020



Include leavers

☐

Full path display

☐

Organisation view

Show all data by unit

New page for each organisation unit

☐


Output type

PDF File

Report run comments

Input notes here

RUN

For example, if you were the manager of the Recruitment Team, click  at 'Organisation start point' and then in the search bar type ***Recruitment** and then select the unit that you are responsible for as shown below.

Flexitime History

Flexitime History ▾ MENU

Unit/Employee ▾ Unit

Org. units search

recruitment x Results 1 Unit

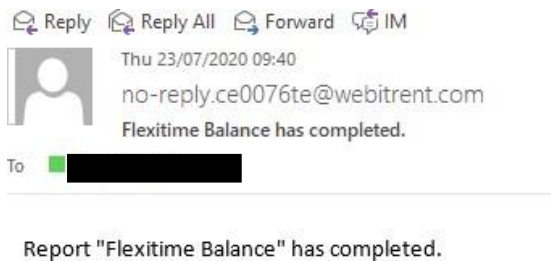
| Organisation unit | Linked to | Status | Unit reference |
|-------------------|-------------------------|--------|----------------|
| Recruitment | Employee Service Centre | Live | UNIT1488 |

RUN

RUN

Once you have completed all of the criteria above, select

You will be notified by email when your report is ready, example of email shown below:



5.2 Viewing your report



To view your report, at the top of the criteria page, select Menu. (The reports are quick to run follow step 5.1 above and click *Download output*.)

Flexitime History ▼ MENU

Unit/Employee • Unit ▼

Organisation start point • North Lanarkshire Council 🔍

Report type • History ▼

Record from • 01/06/2019 📅

Record to • 30/07/2020 📅

Include leavers ☐

Full path display ☐

Organisation view • Show all data by unit ▼

New page for each organisation unit ☐


Output type • CSV File ▼

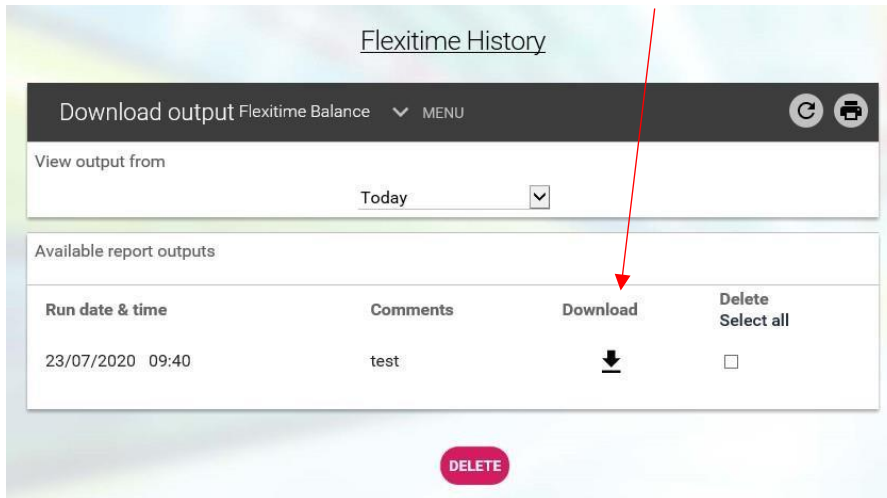
Report run comments

Select 'Download output'

Flexitime History ⬆️ LESS

however if you're no longer on this page below, please

Click  to download and open your report as shown below:




Flexitime History

Download output Flexitime Balance ▼ MENU

View output from Today ▼

Available report outputs

| Run date & time | Comments | Download | Delete Select all |
|------------------|----------|---|--------------------------|
| 23/07/2020 09:40 | test |  | <input type="checkbox"/> |

DELETE

Select 'open'. This will open your report in a new window. You can then save this if required. Example of a report in PDF format is shown below.

| Missing Flexi Records | | | |
|-------------------------------|---------------------------|----------------|-------------------------|
| Absences From: | 01/06/2020 | To: 30/07/2020 | Organisation View: Full |
| Employee Name: | [REDACTED] | | |
| Organisation Start Point: | North Lanarkshire Council | | |
| | | | Include Leavers: No |
| | | | No Clock In Date |
| North Lanarkshire Council/... | | | 22/07/2020 |
| [REDACTED] | | | 29/07/2020 |
| | | | 30/07/2020 |

These reports can be run by managers as frequently as required.

6. Authorisation

It will be the employee's responsibility to record their flexi details for each day they are working – arrival, lunch depart, lunch arrival and depart etc. You will be able to view/amend and delete if required.

You will only be required to approve flexi leave. Requests are found within your to-do-list within myTeam. A direct link will also be contained within your email alerts.