



University
of Exeter



Authorising Time & expenses

People Manager

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Authorising Time & Expenses

Introduction

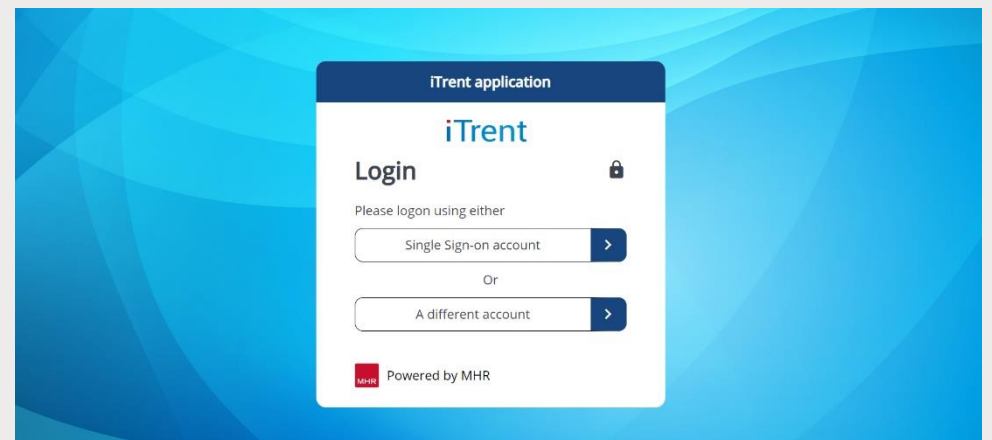
This tool enables Managers to view personal and organisational details, record sickness absence and approve annual leave for contracted staff that report to them.

As a People Manager user, you will only have access to the information related to staff who report to you. This information includes some sensitive details, and it is important that you use it responsibly to ensure that the security of your team's details are maintained.

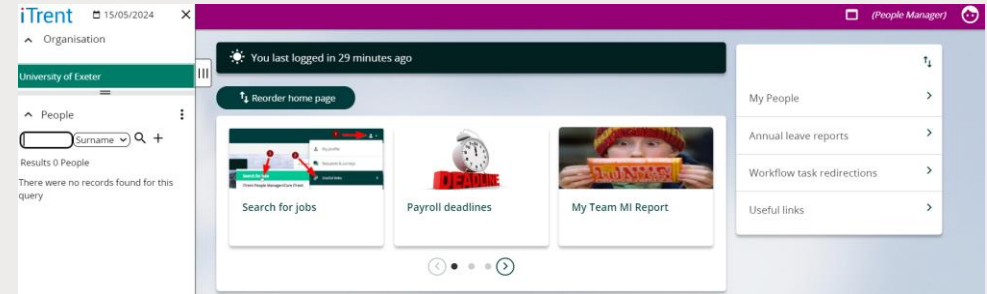
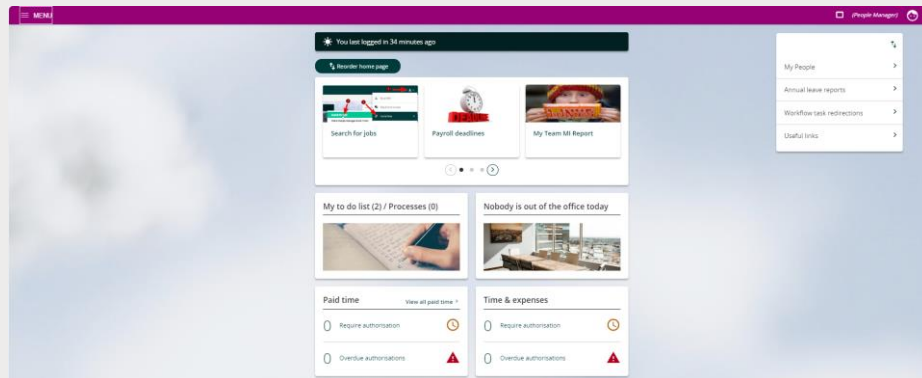
iTrent

Log into Trent by clicking here [iTrent - Login options \(exeter.ac.uk\)](https://exeter.ac.uk/iTrent-Login-options)

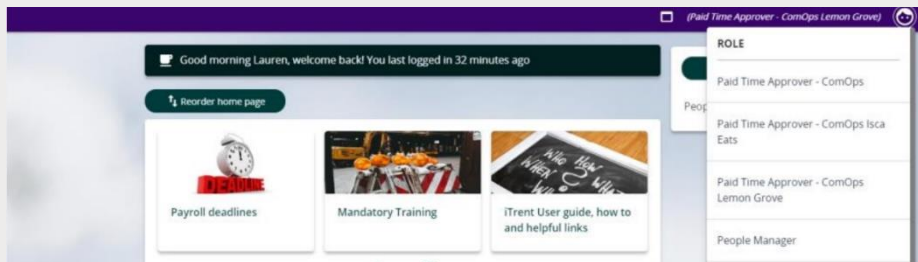
Choose single sign-on account and log in using your username and password.



You will be taken to your home screen as indicated below.



Click on the face in the top right-hand corner of the screen and choose the outlet that you require, as indicated below.

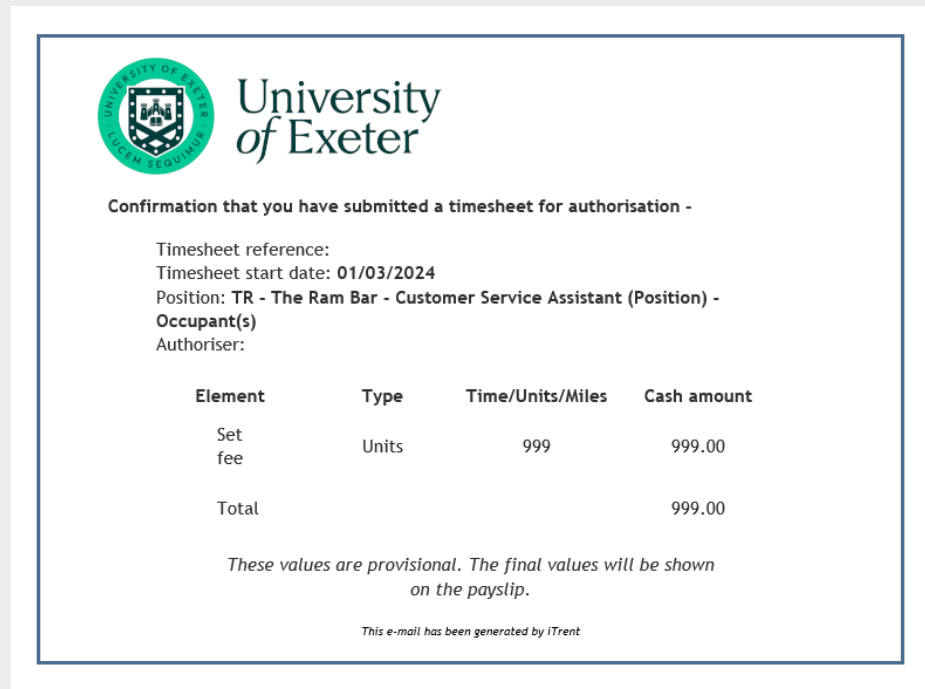


On the right-hand side, you will find a list of pages.

“My People” Click on this link to view details of your people shown on the left-hand side of the screen. Using the search button by their surname, payroll number, etc

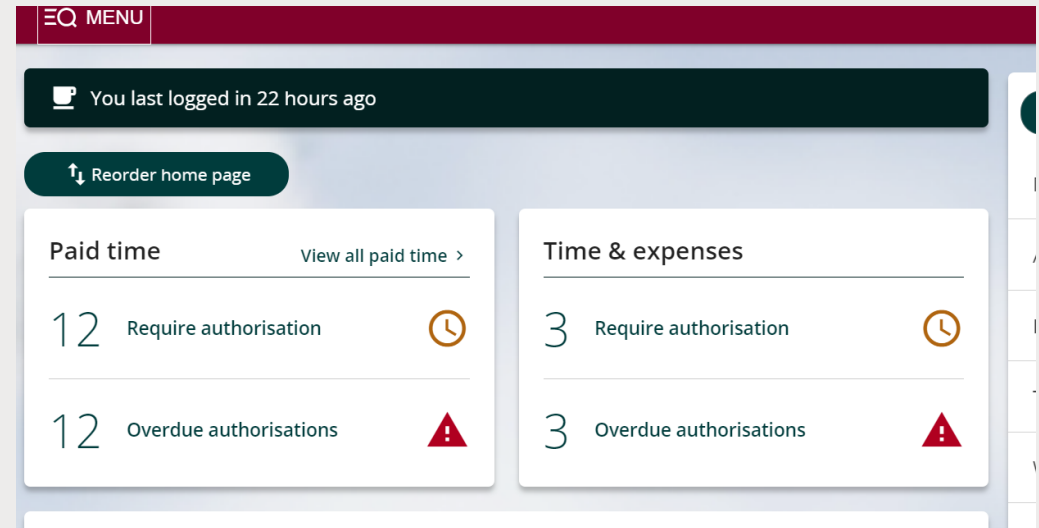
Approving Time & Expenses for your people

When one of your people submits a Time & Expense, you will receive the below email advising you that you have approvals to make:

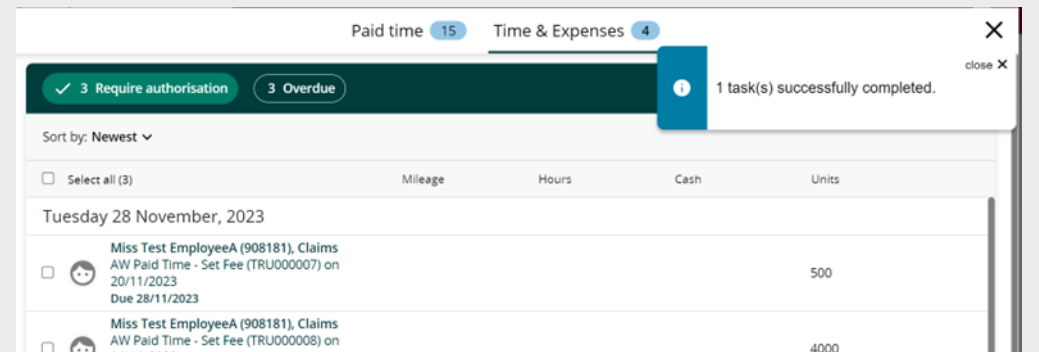


By clicking on the link at the bottom of the email you will be taken to the Time & Expense to be approved.

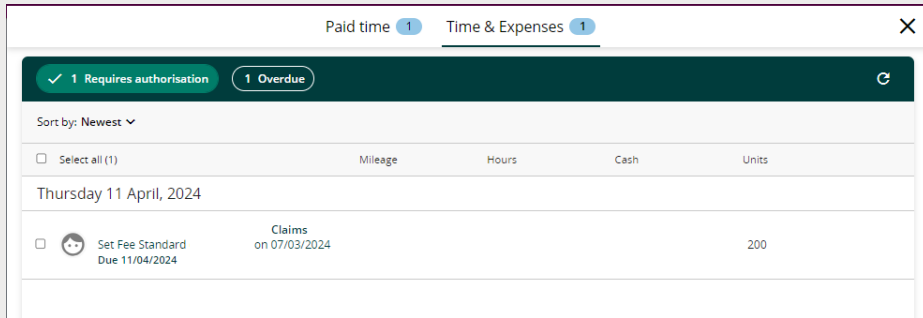
On the home screen you will also see the Time & expenses for your people.



By clicking on Time & Expenses widget, you will be taken to your peoples Time & Expenses that need your authorisation.

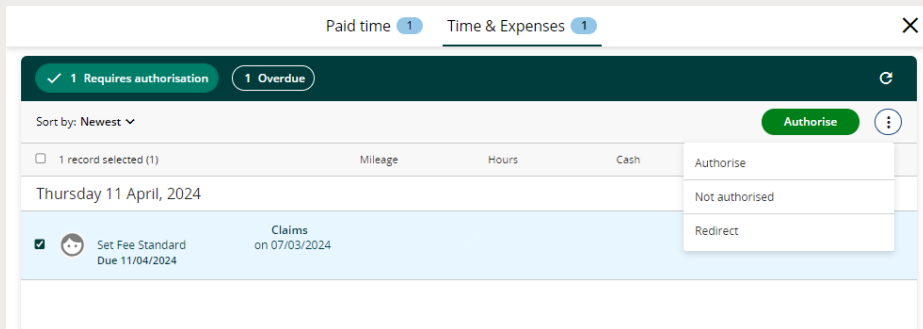


Click on 'Require authorisation' to see the Time & Expenses that requires authorisation.



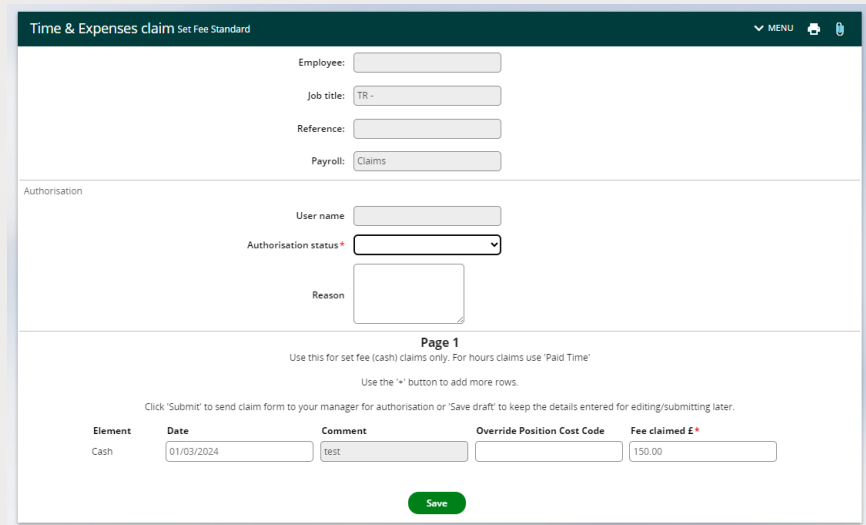
To authorise the Time & Expenses selected, click the green “Authorise” button in the top right-hand corner.

You can also authorise, not authorise, or redirect the Time & Expense by clicking on the three vertical dots next to the green authorise button.

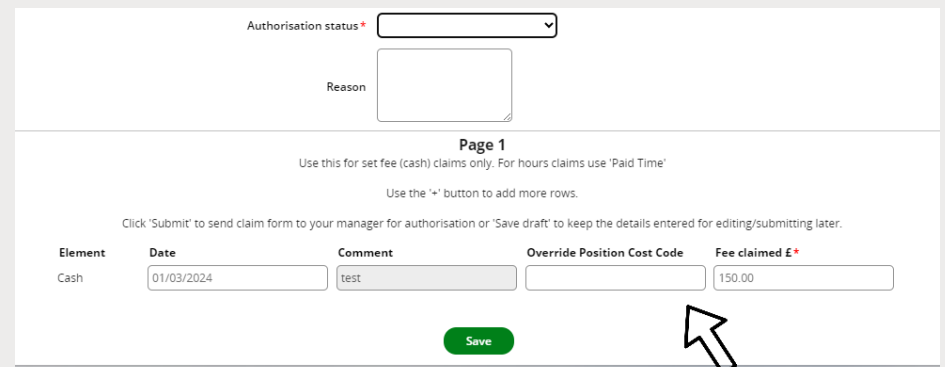


Once an option has been chosen, the time sheets will be removed from your queue and a pop-up box will advise the number of tasks that have been successfully completed.

When authorising Time & Expenses, the approver has the option to ‘Override Position Cost Code’ before approving the claim. This allows an amendment to the original cost code attached to the claimant’s position.



The Claimant also has the option to ‘Override Position Cost Code’ when submitting Time & Expenses. If the claimant chooses to override the position cost code, this will appear in the “Override Position Cost Code” box when an approver authorises Time & Expenses.



Once a Time & Expense record has been approved you will receive the below notification by email.



University of Exeter

Timesheet Approved

Timesheet reference:
 Timesheet start date: 07/03/2024
 Position: TR - Reception Assistant (Position) - Occupant(s)

Approver comment:
 Payment date: 27/06/2024

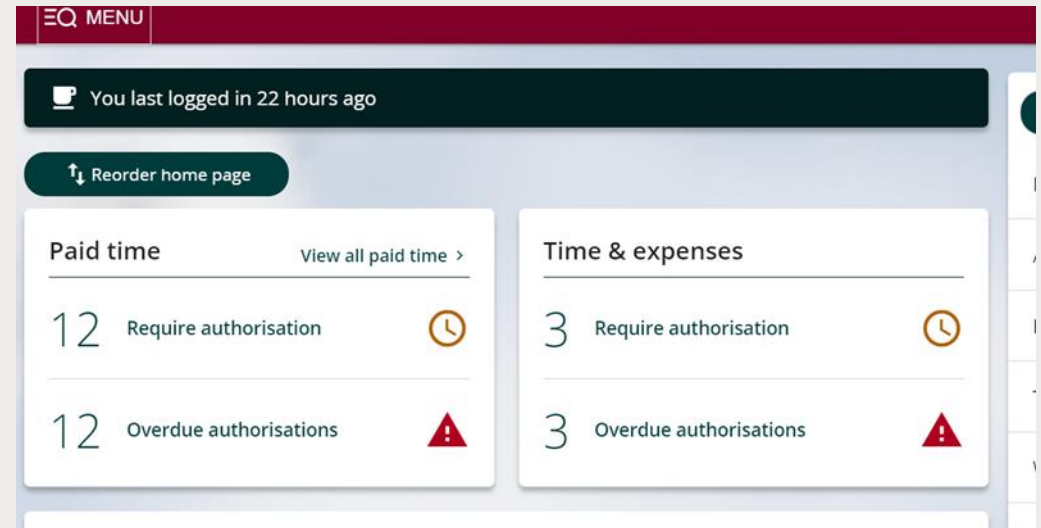
Element	Type	Time/Units/Miles	Cash amount
Paid Time - Set fee	Units	200	200.00
Total			200.00

These values are provisional. The final values will be shown on the payslip.

This e-mail has been generated by iTrent

Not authorising Time & Expenses

On the home screen click on the link advising of the Time & Expenses requiring authorisation.



EQ MENU

You last logged in 22 hours ago

Reorder home page

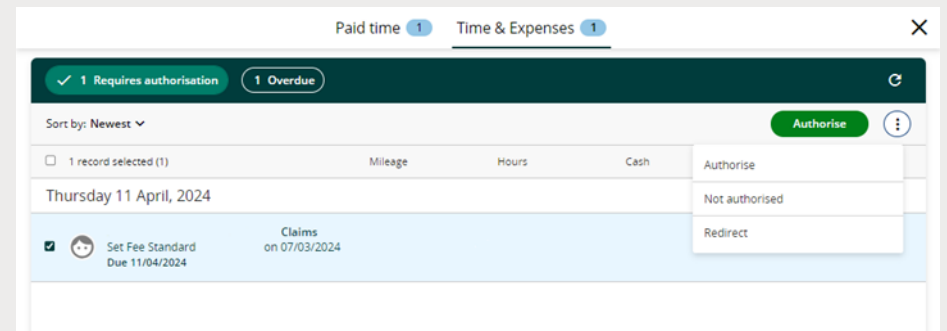
Paid time [View all paid time >](#)

- 12 Require authorisation ⌚
- 12 Overdue authorisations ⚠️

Time & expenses

- 3 Require authorisation ⌚
- 3 Overdue authorisations ⚠️

Click on the Time & Expense that you want to not authorise.



Paid time 1 Time & Expenses 1

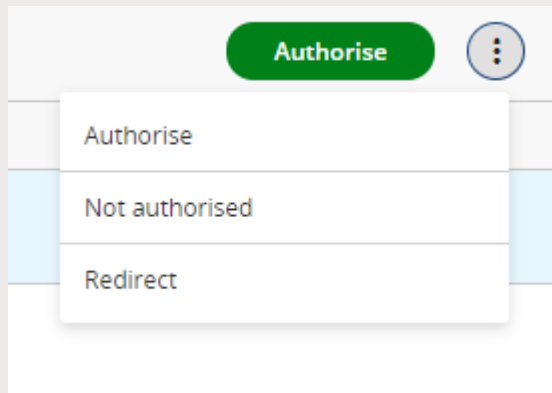
1 Requires authorisation 1 Overdue

Sort by: Newest

1 record selected (1)

	Mileage	Hours	Cash	
Thursday 11 April, 2024				Authorise
<input checked="" type="checkbox"/> ⌚ Set Fee Standard Due 11/04/2024				Not authorised
				Redirect

Click on the three dots on the top right-hand corner, where you will be given the option to not authorise the Time & Expense.

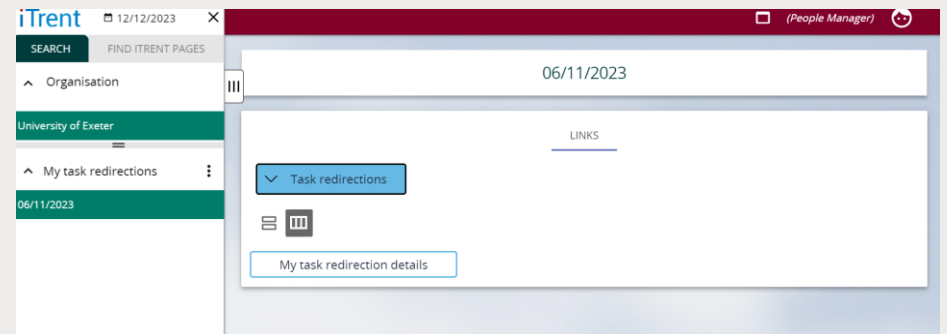


A pop-up box will advise that the task has been successfully completed and the Time & Expense will be removed from the list.

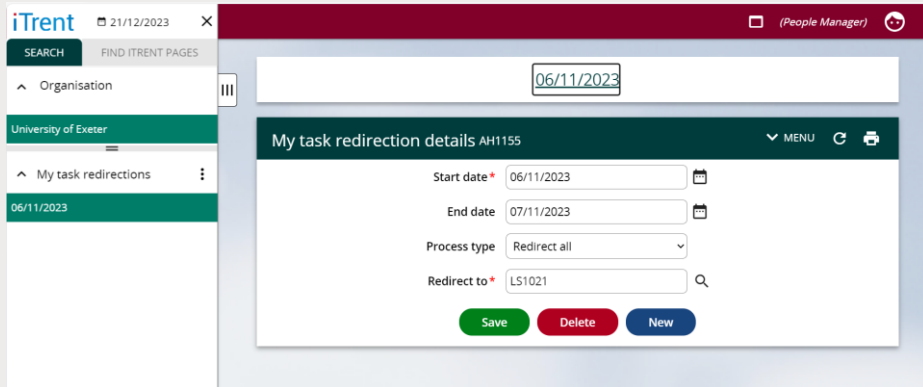
An email will be sent to the claimant advising that their hours have been not authorised and to contact you directly for further information.

Workflow task redirections

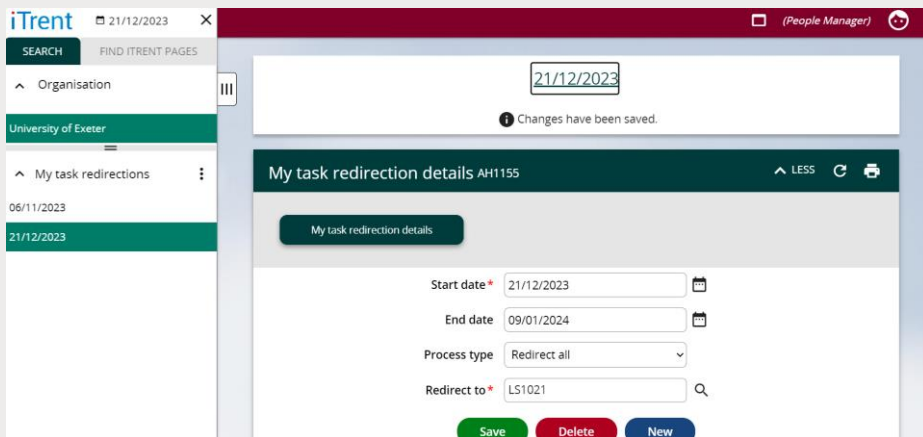
Click on this link to set up task redirection to another manager if you are due to be absent from work and unable to authorise annual leave requests or PTA timesheets. This will forward all workflow related Tasks and Emails to another specified user for the duration set.



You will need to enter the start and end date (if known – leave blank for ongoing redirections and end date can be added later), change the 'Process type' to Redirect all and search for the individual who is to receive the notifications in your absence by clicking on the magnifying glass against 'Redirects to'.

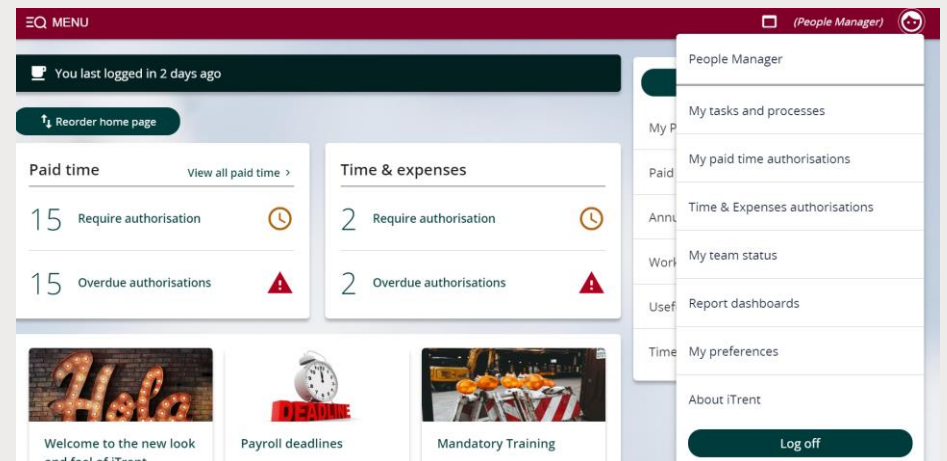


Click on the green “save” button at the bottom of the page to save your changes.



IMPORTANT SECURITY ADVICE As this Self-Service system includes some very sensitive information about your people it is important that you use it responsibly to ensure that the security of personal information is maintained. You should therefore always log out of Self Service once you have finished using it and should never let anyone know your university username & password.

To log out of Self Service always click on 'Sign out' which can be found in the Utility menu in the top right-hand corner.

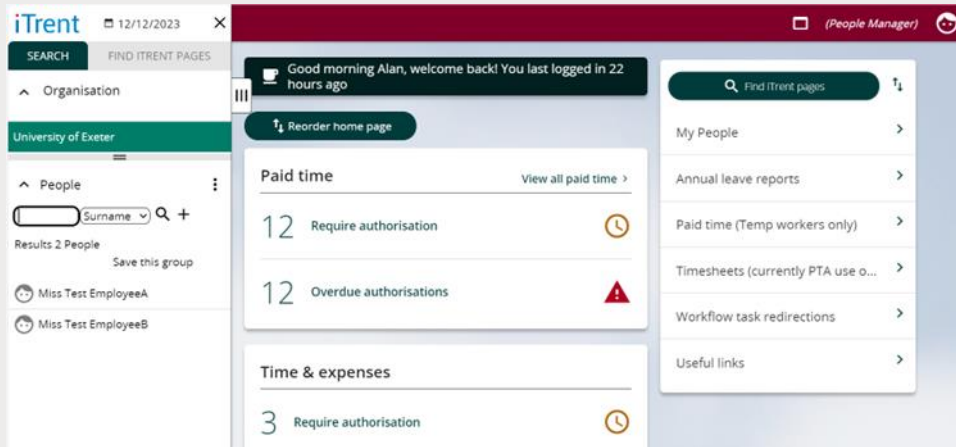


Alternatively, please ensure you close the browser or tab as this will log you out automatically.

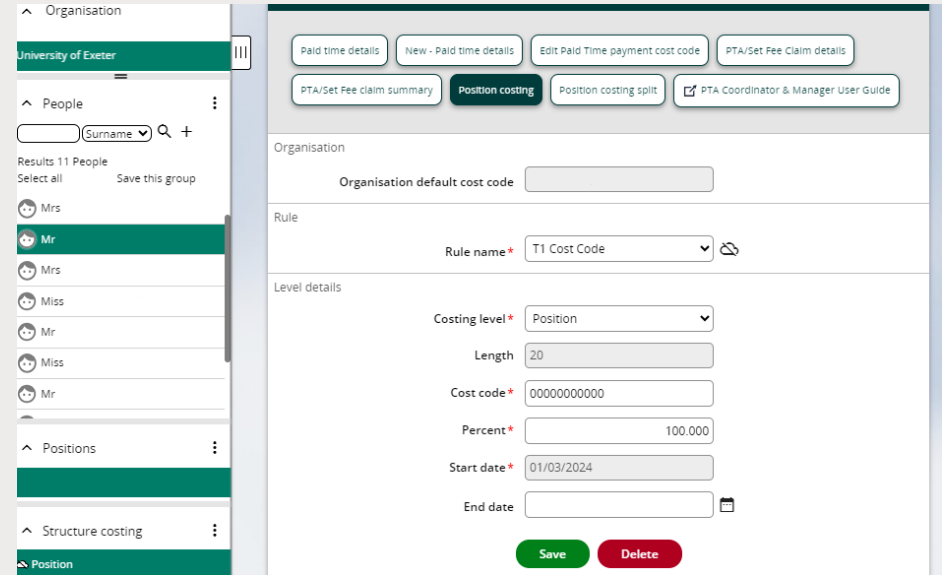
Finding the cost code for a claimant's position

On the right-hand side, you will find a list of pages.

“My People” Click on this link to view details of your people shown on the left-hand side of the screen. Using the search button by their surname, payroll number, etc



You will need to select **“Paid Time and PTA/Set Fee Claims”** and then click **“Position costing”** to view the cost code attached to the claimant's position.



To view the cost code for a claimant, you will need to select their name from the search list on the left-hand side.

