

Section		Page
1	Process Overview	01
2	Login to Manager Self-Service	01
3	Transfer Holiday Entitlement to the Next Holiday leave Year	03
4	Cancelling Holiday which has not been taken	04
5	Frequently Asked Questions	05
7	Version Amendments	05

1. PROCESS OVERVIEW


- Any professional services colleagues who have a leave year that ends on 31 March can, if they wish, take leave up to the end of the week in which Easter Monday falls, where Easter falls after the end of March.
- In this situation, the relevant outstanding holiday entitlement needs to be transferred from the current leave year into the next leave year via your People Manager (Manger Self-Service) role.
- If one of your team booked annual leave through iTrent but then did not take leave, this should be deleted via People Manager. If the leave dates are in the future, the employee is able to cancel the leave themselves, via Employee Self-Service.

If you have any queries about whether it is appropriate to transfer leave from one year to the next, please contact the People Services Team in the first instance. (see red above)

2. LOGIN TO MANAGER SELF-SERVICE

- Go to the Leeds Beckett Staff site > click on System Login Links > click on iTrent Manager Self-Service.
- Enter your University network username and pass-word.

System Login Links:

Click here for email, iTrent, MyBeckett etc 

[iTrent Manager Self-Service](#) 

- Once you have logged in, the following desktop navigation options are displayed.

The screenshot shows the EQ MENU desktop navigation interface. At the top right, there is a 'Log Off' button and a user profile icon labeled '(PEOPLE MANAGER)'. Below the header, a large banner image displays a colorful, abstract pattern. On the right side, a 'Hello Jayne' greeting is shown, along with a 'You last logged in 4 minutes ago' message and a 'My to do list (1) / Processes (0)' link. A 'SECTIONS' dropdown menu is open, showing options for 'PEOPLE', 'HOLIDAY ABSENCE', and 'EQ Find iTrent pages'. A callout box points to the 'HOLIDAY ABSENCE' option, stating: 'Click here for Holiday absence information for people you line manage'. Below the banner, there are four main sections: 'My to do list (1) / Processes (0)', 'Nobody is out of the office today', 'A-Z GUIDES AND SUPPORT', and 'BANK DETAILS UPDATES'. Callout boxes provide further details: 'Any tasks that require action or any reports you have set to run are accessed from here' points to the 'My to do list' section; 'Displays anyone who is absent that day. Click to access a full team absence calendar' points to the 'Nobody is out of the office today' section; and a 'SECTIONS' list points to the 'BANK DETAILS UPDATES' section, including: People, Holiday Absence, Sickness Absence, Other Absence, Expense Claims, Absence Reports, People Reports, and Task Redirection.

EQ MENU

Log Off (PEOPLE MANAGER)

Hello Jayne

You last logged in 4 minutes ago

My to do list (1) / Processes (0)

PEOPLE

HOLIDAY ABSENCE

EQ Find iTrent pages

Click here for Holiday absence information for people you line manage

My to do list (1) / Processes (0)

Nobody is out of the office today

A-Z GUIDES AND SUPPORT

BANK DETAILS UPDATES

Any tasks that require action or any reports you have set to run are accessed from here

Displays anyone who is absent that day. Click to access a full team absence calendar

SECTIONS

- People
- Holiday Absence
- Sickness Absence
- Other Absence
- Expense Claims
- Absence Reports
- People Reports
- Task Redirection

3. TRANSFER HOLIDAY ENTITLEMENT TO THE NEXT HOLIDAY LEAVE YEAR

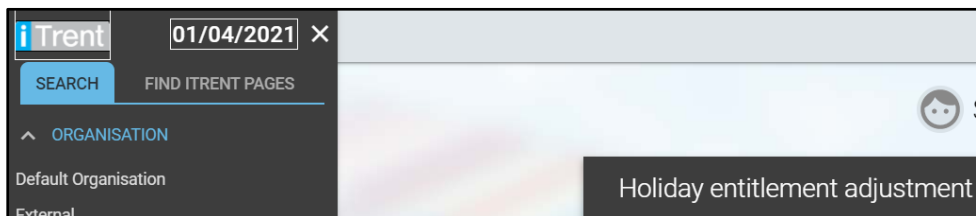
- Click on the Holiday Absence section, then select an employee from the left-hand panel.
- The Holiday Absence folder links are then displayed as shown below.
- Click on the Transfer Holiday Entitlement link.

The screenshot shows a web interface for 'Holiday Absence'. At the top left is a blue button with a dropdown arrow and the text 'Holiday Absence'. Below it are two icons: a list icon and a calendar icon. To the right of these icons are three buttons: 'Team Absence Calendar', 'Holiday Entitlement Summary', and 'Holiday Absence Details'. Below these are three more buttons: 'Transfer Holiday Entitlement', 'User Guide: How to Authorise Holiday' (with an external link icon), and 'User Guide: How to Transfer Holiday Enti...' (with an external link icon). At the bottom left is a button 'User Guide: How to Delete Untaken Holid...' (with an external link icon).

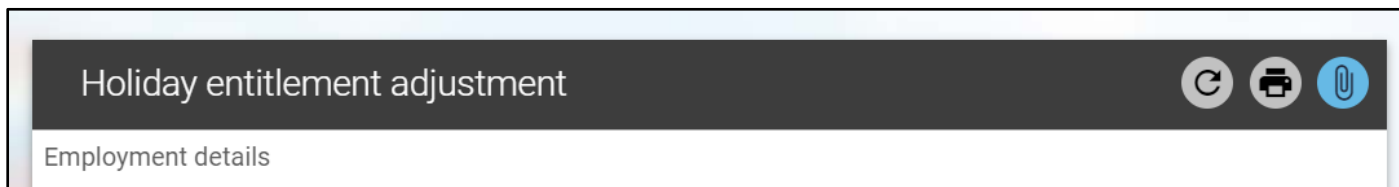
- Clicking on Transfer Holiday Entitlement will take you to the Holiday Entitlement Adjustment screen.

The screenshot shows the 'Holiday entitlement adjustment' screen. At the top is a dark header bar with the title 'Holiday entitlement adjustment', a dropdown arrow, and the word 'MENU'. To the right of the header are three icons: a refresh icon, a print icon, and a document icon. Below the header is a section titled 'Employment details' with a 'Position' dropdown menu. Below that is a section titled 'Period details' with 'Holiday period dates' (01/04/2019 - 31/03/2020), 'Scheme name' (Supp Grade 1-3 Holiday), 'Entitlement for period' (37 days (37 days Pro Rat)), and 'Brought forward' (Brought forward not used (lost)). Below that is a section titled 'Adjustment details' with 'Adjustment type' (Adjust). At the bottom is a table with columns: Date entered, User name, Value, Reason, End date, and Entitlement Add Remove. The 'End date' column has the value 31/03/2020. The 'Entitlement Add Remove' column has '+' and '-' buttons.

- It is important that you debit the current leave year before crediting the next leave year.
- Select the current holiday year from the Holiday Period Dates drop-down list.
- Under the Adjustment Details section, enter a new line of data.
- For Value, enter the number of hours or days you are deducting.
- You will need to enter this as a minus number, for example -3.
- For Reason, enter the reason as "transferred to holiday year ending <date of year end which you are transferring the balance to>", for example "transferred to holiday year ending 31/03/2021".
- Click on Save.
- To credit the new leave year, first change the effective date at the top left-hand corner of iTrent to the start of the new holiday year period, for example 01/042021.



- Refresh the holiday adjustment screen by clicking on the circular arrow



- Select the new holiday year from the drop-down Holiday period dates list.

Period details

Holiday period dates

- 01/04/2018 - 31/03/2019
- 01/04/2019 - 31/03/2020
- 01/04/2020 - 31/03/2021

- Enter a new line of data.
- Add the number of hours or days you are crediting to the value column.
- For Reason, enter <transferred from year ending <date of year end which you are transferring the balance from>
- Click save.
- Once saved you will see the credit has been added to the entitlement for the next leave year as below.

Holiday entitlement adjustment MENU

Employment details

Position

Period details

Holiday period dates 01/04/2020 - 31/03/2021

Scheme name Supp Grade 1-3 Holiday

Entitlement for period 37 days (37 days Pro Rat)

Brought forward

Brought forward not used (lost)

Adjustment details

Adjustment type Adjust

Date entered	User name	Value	Reason	End date	Entitlement	Add	Remove
15/01/2020		3.000	transferred from yr ending	31/03/2021	40 days	+	-
				31/03/2021		+	-

Handy Tips >

- Navigate between employees, within the same screen, by clicking on a different name in the left-hand panel.
- To navigate to a different Section, click on the Home button iTrent

4. CANCEL (DELETE) HOLIDAY WHICH HAS NOT BEEN TAKEN

- Click on Holiday Absence Details.
- Select the relevant holiday date from the left-hand panel.
- If the holiday was not taken by the employee click on delete.

Holiday absence details ▼ MENU

Holiday period
Holiday period (required) Full day ▼

Holiday start
Holiday start date (required) 06/01/2020 📅

Holiday end

Absence
Absence type (required) Annual Leave ▼

Authorisation Not applicable

Position

+ Holiday balances

SAVE **DELETE**

- The holiday record will be removed from the list of the left-hand panel.

5. FREQUENTLY ASKED QUESTIONS

Manager FAQs

When would I need to transfer holiday?

Any professional services colleagues who have a leave year that ends on 31 March can, if they wish, take leave up to the end of the week in which Easter Monday falls, where Easter falls after the end of March. In this situation, the relevant holiday entitlement needs to be transferred from the current leave year into the next leave year via your People Manager (Manger Self-Service) role.

Why do I need to debit holiday?

If you have agreed that the employee may take their annual leave after the end of the holiday year then you will need to debit the current year to make sure that they do not overtake their annual leave in the current leave year.

When would I need to delete a holiday record?

If the employee had booked holiday on iTrent but this wasn't taken, then you would need to delete the holiday record. If the leave dates are in the future, the employee is able to cancel the leave themselves, via Employee Self-Service

FEEDBACK

We welcome feedback on this document. If you have any comments, please email hris@leedsbeckett.ac.uk

6. VERSION CONTROL

DATE	SECTION	DETAILS	VERSION
January 2020	All	New guide for MSS	V 1.0
January 2021	Transfer holiday entitlement	Changing effective date of holiday year	V 1.3