


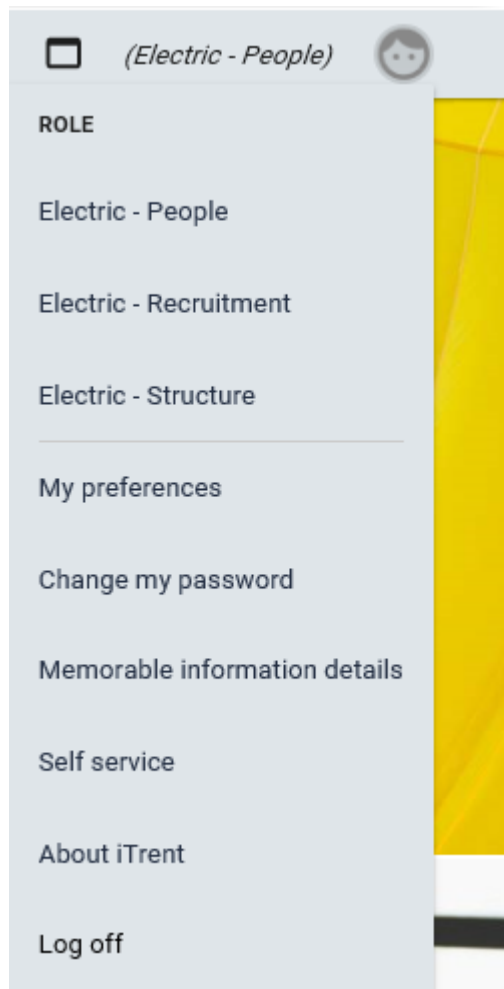
## iTrent Homepage, Summary cards and Forms

### Homepage

There are 3 menus in the homepage of iTrent Electric:

### Personal

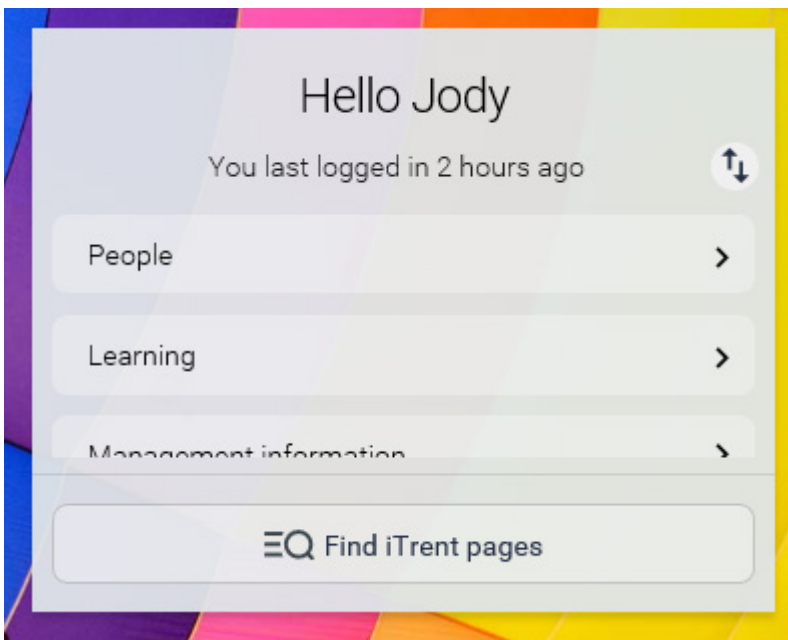
Click on the Face Icon  in the top right corner of the homepage and your personal menu will appear:



From this menu you can switch between roles, update user information and go to your self service area.

## LINKS

The Links menu is in the main body of the homescreen:



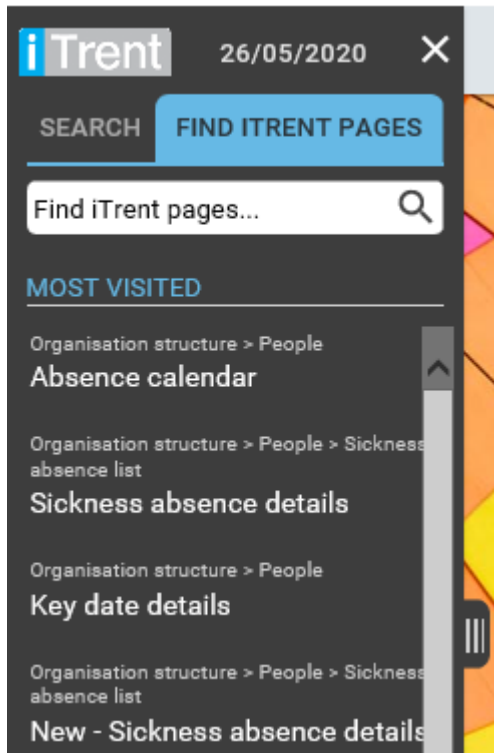
From this menu you will access the sections of information available to you which is accessed by a series of Links.

Please note:

- In some sections you will be prompted to provide details in the main menu before the section detail can open. For example, if you click on People the main menu will open and will prompt you to search and/or select an employee.
- If you click on 'Find iTrent pages' in this menu the Main Menu will open and display a list of your most visited pages along with a search field.

## Main

The main menu also opens when you click on the MENU icon



As you start to use iTrent Electric it will build up a list of the sections you visit most frequently and you can search for any form that is available to you.

If at any point you wish to return to the homepage then click on the

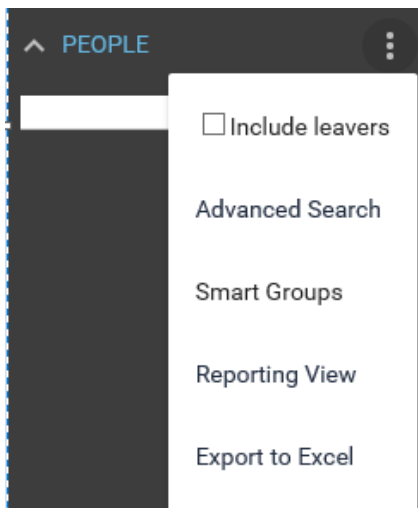


If you need to expand this menu click on:

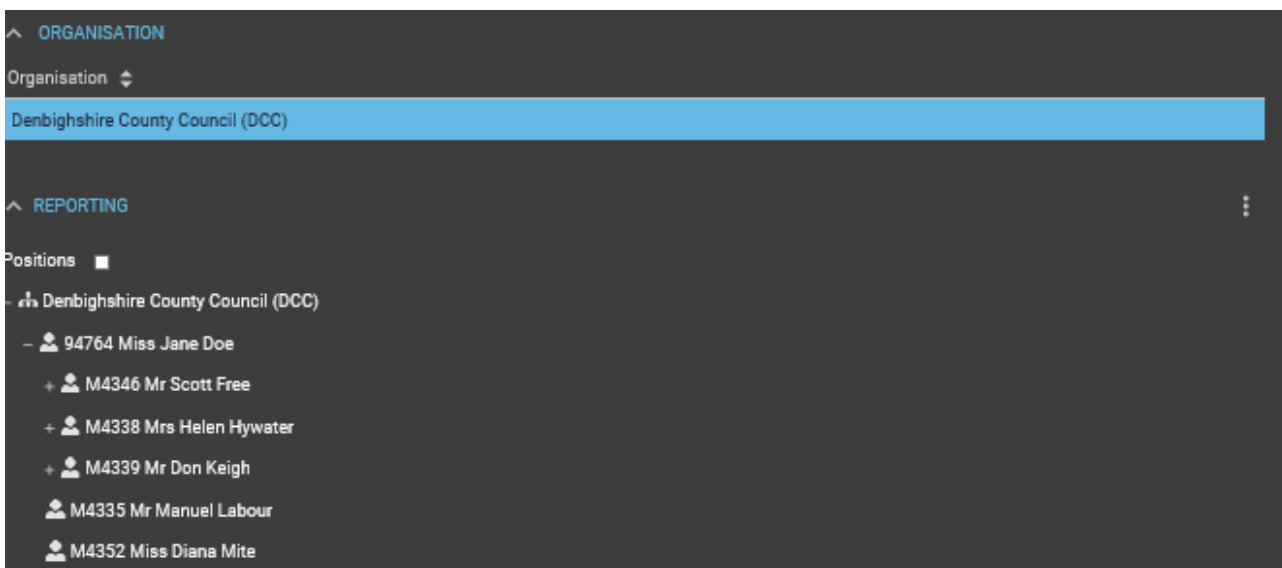


If you are prompted to search for something in the main menu and need to use advanced search it is accessed by clicking on the three vertical dots next to the

section being searched, in the following example it's next to PEOPLE.



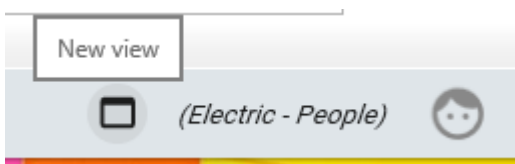
Use the 'Reporting View' (image above) menu item to view an expandable list of your reportees (image below). Click on the + next to any of your direct reports to view the employees that report to them.



Other features of the homescreen include:

## New View

To open a further instance of iTrent click on the 'New View' button



## Carousel

The Electric carousel displays:

- 'My to do list/Processes' link
- Out of Office Calendar link
- Other areas of interest

A maximum of 4 link items will be displayed in the carousel at any one time on the home page (additional items can be viewed using the arrow buttons.)

Click on the item to go to the information and then to return you either close the item or

click on the iTrent Home button



## Summary Cards

Summary cards typically bring together a display of connected information and have a links area at the bottom where you access further related information.

**Personal**  
Review date is due on 26/02/2020  
Known as Scott  
1 Year(s) 3 Month(s) in service  
M4346 (Personal ref.)  
NZ555251D (Social security)  
07890570580 (Personal)

**Employment**  
Pen Testing Manager - Electric (M4346A) | Colwyn Bay  
30.00 hours | Employee | Part time | Fixed Term  
Started on 01/02/2019 | expected occupancy end date 24/06/2020  
Reporting manager: 94764 Miss Jane Doe, Pen Tester Manager 2

**Calendar**  
27 May 2019 - 27 May 2020  
VIEW FULL CALENDAR  
27 May - 09 Jun 2020  
0 days off sick (as of last calculation)

**LINKS**  
Personal information, Employment, One to Ones, Probationary Period, Profile, Sickness Absence, Other Absence, Appraisals, User defined forms

Personal details, NI Number, Key date details, Contact details, Address details, Address History, Emergency contact details, Miscellaneous details

Summary Cards are generally organised in sections. For example, the Person Summary card is organised in the following sections:

- **Personal**  
Summary of personal details – clicking on some details and it will open the form which can be edited.
- **Employment**  
Summary of current positions
- **Calendar**

Displays the working pattern and absences which are entered on iTrent for the employee position. NB: If an employee has multiple positions you must first select the position in the Employment section above.

- **LINKS**

Coloured folders are displayed which group other information into sections. If you click on a folder the links to details, forms and actions appear beneath the folders.

Two icons are displayed that allow you to choose the way that links are displayed.



Links are displayed like tiles



Links are displayed in columns

A summary card will cache when you first open it. If you make a change to the detail in the summary card then refresh the data by clicking on the refresh button



# iTrent Form Features


There are four features in an iTrent form to be aware of:

The screenshot shows a form for 'Sickness absence details' for employee 'M4346 Mr Scott Free'. The form is divided into several sections: 'Sickness period' with a dropdown set to 'Full day'; 'Absence start' with a date field set to '24/05/2020'; 'Absence end' which is currently empty; and 'Absence' with 'Absence type' set to 'Sickness' and 'Absence reason' set to 'Back Neck Problems'. There is also a 'Hide absence reason' checkbox which is unchecked, and a 'Position' field set to 'Pen Testing Manager - Electric (Current)'. A 'MENU' button is located in the top right of the form banner. At the bottom of the form are three action buttons: 'CALCULATE' (green), 'DELETE' (red), and 'NEW' (blue).

- **Header**

This is the employee picture (if available), personal reference and name. If you click on this you return to the person summary screen.

- **Details menu**

This will expand if you click on the  [Caption: Image of details menu button in form banner] button. You can then go directly to other related forms and information in this section.

- **Paperclip icon**

If a form has an attachment or a UDF category it can be accessed by clicking on the paperclip.

- **Action buttons**

These are appropriate to the form, common ones are SAVE, DELETE, NEW etc.