

# User Guide

## Event Bookings

### My HR and Payroll

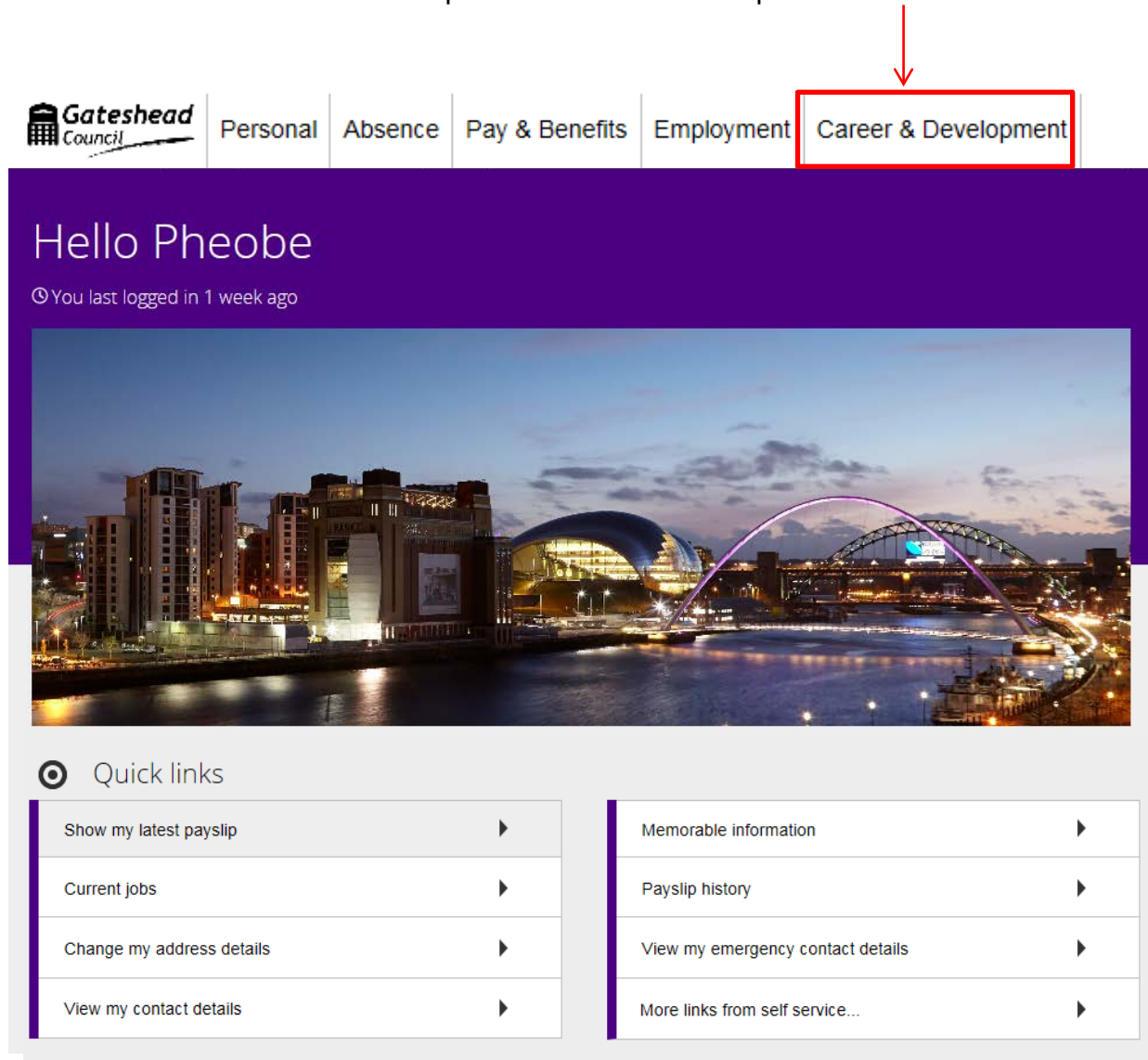


## APPLYING FOR TRAINING EVENTS

The Learning and Development online Booking Request Form has now been replaced with a Career and Development module within iTrent. All new requests for training and cancellations must now be submitted via iTrent.

## GETTING STARTED

1. Log into My HR and Payroll
2. Click on the “Career & Development” section at the top of the screen.



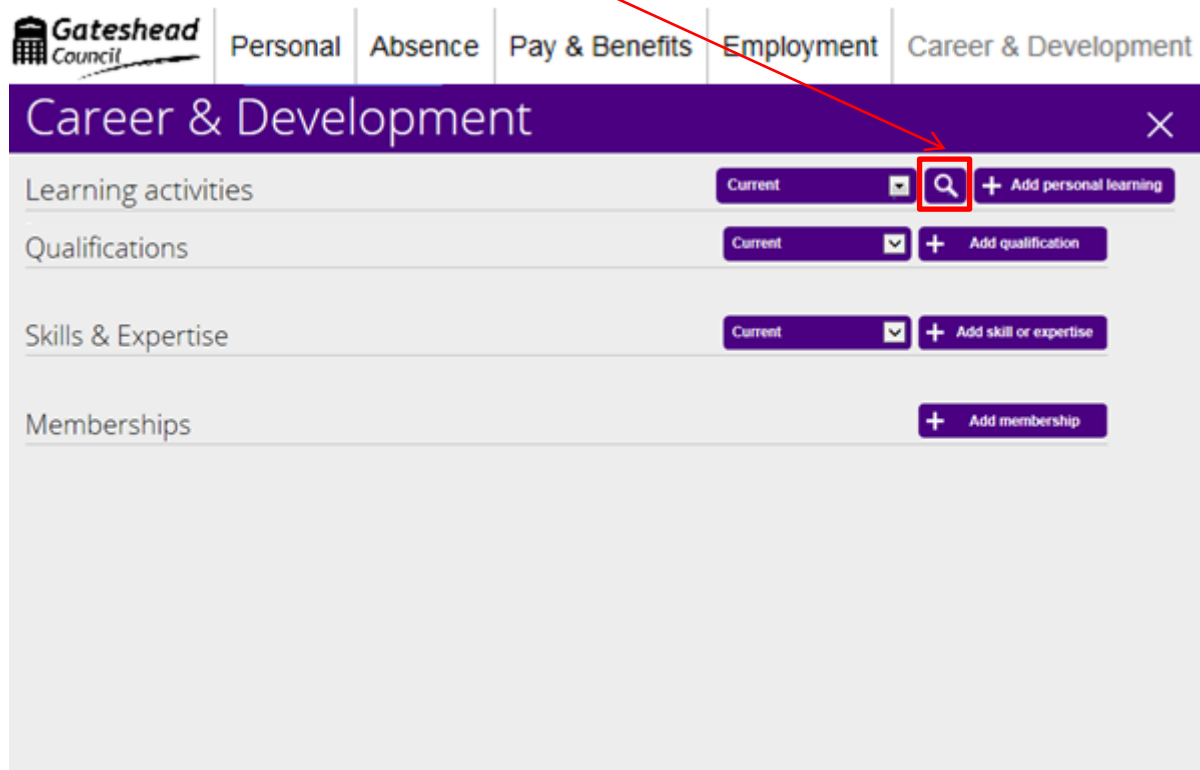
The screenshot shows the iTrent user interface. At the top, there is a navigation bar with the following items: Gateshead Council, Personal, Absence, Pay & Benefits, Employment, and Career & Development. The 'Career & Development' item is highlighted with a red box, and a red arrow points to it from the text above. Below the navigation bar, the user is greeted with 'Hello Pheobe' and 'You last logged in 1 week ago'. A large image of the Gateshead waterfront at night is displayed. Below the image, there is a 'Quick links' section with two columns of links:

Quick links	
Show my latest payslip	▶
Current jobs	▶
Change my address details	▶
View my contact details	▶
Memorable information	▶
Payslip history	▶
View my emergency contact details	▶
More links from self service...	▶

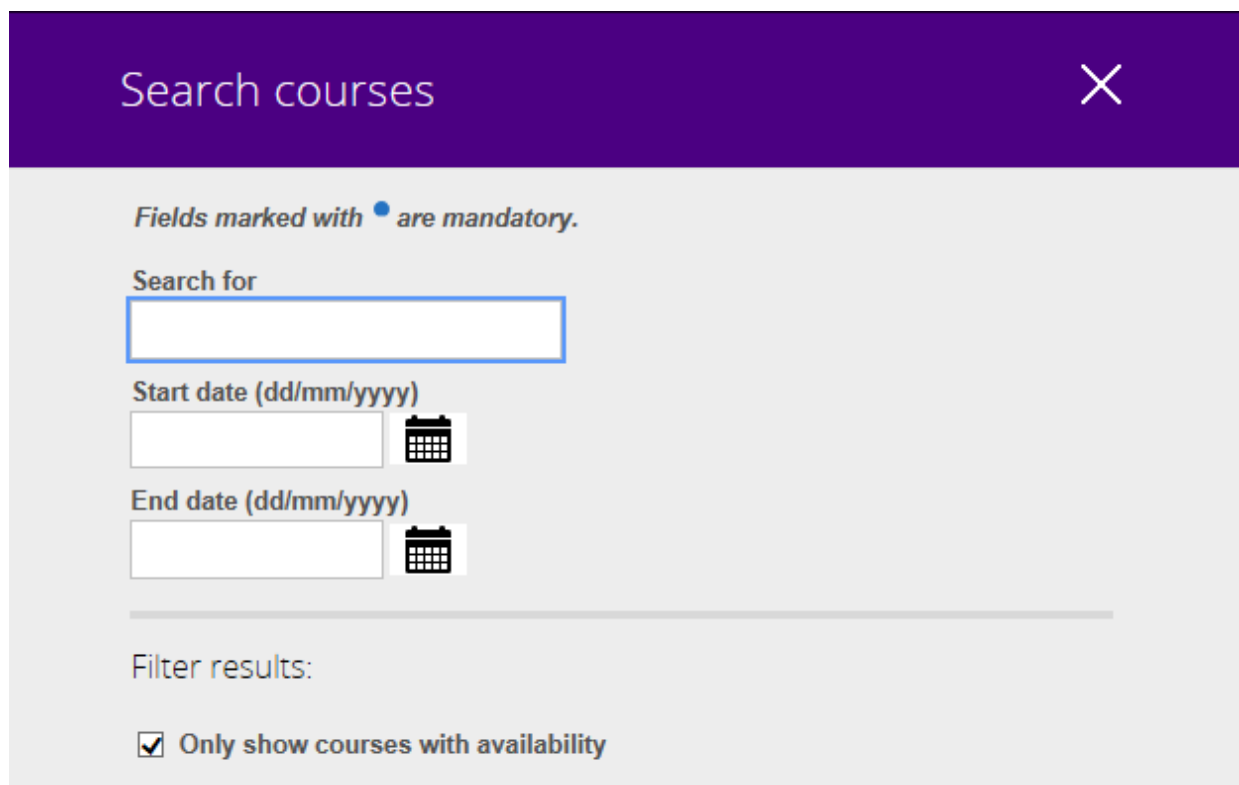
**It is vitally important at this stage that you check what the system has stored for you under Personal “Special Requirements”, Mobility constraints as this informs Workforce Development if you have any support requirements.**

## SEARCHING FOR AN EVENT AND REGISTERING YOUR INTEREST

1. Click on the magnifying glass



2. You can search for a specific event by entering its full or part name in the “Search for” field. Events can also be narrowed down by entering the start and end date ranges using the calendar facility.



The screenshot shows the 'Search courses' form. It has a purple header with the title 'Search courses' and a close button (X). Below the header, there is a note: 'Fields marked with • are mandatory.' The form contains the following fields:

- 'Search for' field: A text input field with a blue border.
- 'Start date (dd/mm/yyyy)' field: A date input field with a calendar icon to its right.
- 'End date (dd/mm/yyyy)' field: A date input field with a calendar icon to its right.


Below the date fields, there is a section for 'Filter results:' with a checked checkbox and the text 'Only show courses with availability'.


3. If you would prefer to see a range of events available leave the fields blank and click the search button at the bottom of the page.

## Search courses ✕

*Fields marked with ● are mandatory.*

Search for

Start date (dd/mm/yyyy)  

End date (dd/mm/yyyy)  

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Filter results:


Only show courses with availability


4. Events with availability will then be displayed showing details such as:
- a. Event dates
  - b. Event times
  - c. Duration
  - d. Venue and room details

## Search courses ✕

*Fields marked with • are mandatory.*

Search for

Start date (dd/mm/yyyy)  
 




End date (dd/mm/yyyy)  
 

---

Filter results:

Only show courses with availability

Results:

<b>Advanced Sugar Craft 2 days</b> Technical Skills	<b>2 Days</b> 
14 Mar 2016 – 25 Apr 2016	09:00 – 16:00
<b>Banana Loaf</b> Catering & Food Hygiene	<b>3 Hours</b> 
31 Mar 2016 – 31 Mar 2016	13:00 – 16:00
17 Aug 2016 – 17 Aug 2016	09:30 – 16:30
25 Oct 2016 – 25 Oct 2016	09:30 – 16:30
Emily Davies Room (Ground Floor, Dryden PDC)	
<b>Beginners Chocolate Work</b> Catering & Food Hygiene	<b>3 Hours</b> 
19 Apr 2016 – 19 Apr 2016	13:00 – 16:00

5. If you wish to see further details of a particular event, click on the white box its details are contained in.

**Search courses** [X]

*Fields marked with • are mandatory.*

Search for  
bike

Start date (dd/mm/yyyy)  
[ ] [Calendar icon]

End date (dd/mm/yyyy)  
[ ] [Calendar icon]

Filter results:  
 Only show courses with availability

Results:

<b>Bike Skills</b> General Training & Development	19 Sep 2016 – 19 Sep 2016	09:30 – 13:30	<b>4 Hours</b> [Green arrow]	Emily Davies Room (Ground Floor, Dryden PDC)
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6. You will then be presented with the event aim. If you are interested in attending click on the white box again

**Course details** [X]

*Fields marked with • are mandatory.*

**Bike Skills**

This course will cover the fundamentals of being safe whilst riding a bike on the road.

19 Sep 2016 – 19 Sep 2016	09:30 – 13:30	[Green arrow]
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Mr Alan Ross  
Emily Davies Room (Ground Floor, Dryden PDC)  
4 spaces available

7. The screen will then display additional information regarding the event such as:
- a. Event information
  - b. Event booking details
  - c. The aim
  - d. Objectives
  - e. Other information

Course booking details✕

Fields marked with • are mandatory.

### Bike Skills ( XBS )

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Course information  
Date: 19 Sep 2016 – 19 Sep 2016  
Venue: Emily Davies Room (Ground Floor, Dryden PDC)  
Time: 09:30 – 13:30  
Tutor: Mr Alan Ross

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Event booking details

Origin of request  Reason

This course will cover the fundamentals of being safe whilst riding a bike on the road.

Objectives  
By the end of the session, participants will have:

- A good knowledge of Bike Safety Gear
- An understanding of the Gateshead Council Bike Scheme
- Reviewed the Highway code and considered its implications

Other participants

Save Cancel

8. It is vitally important at this stage that you check what the system has stored for you against **“Other information”, Mobility constraints**

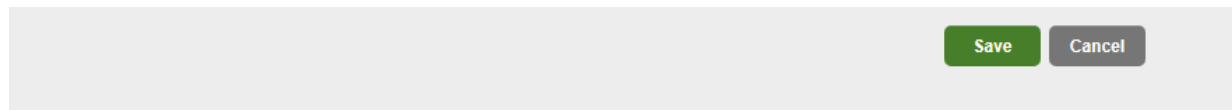
Other information  
Mobility constraints: No

Save Cancel

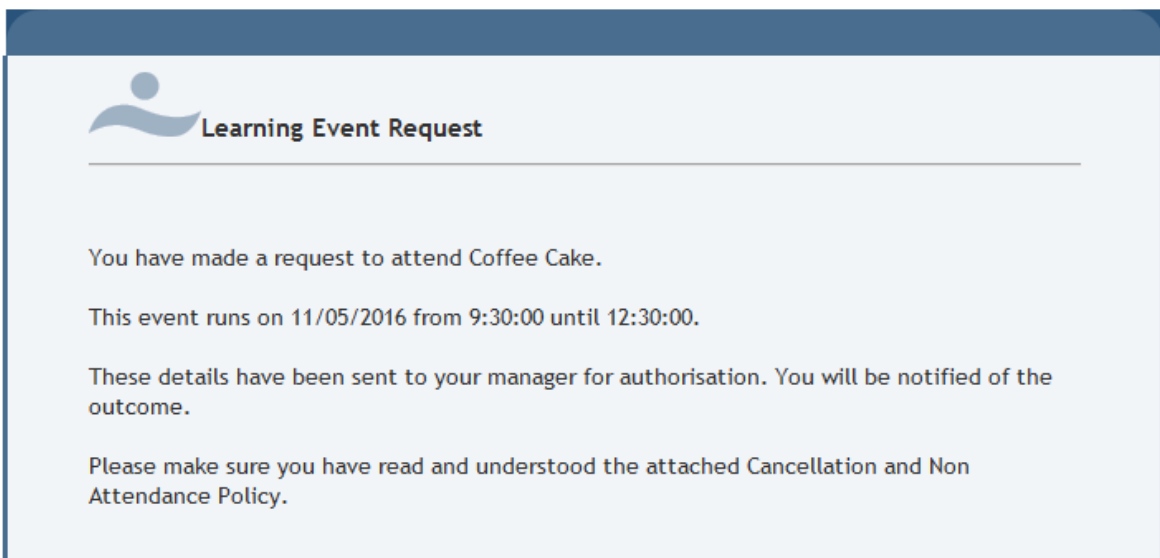


The majority of training rooms are on the 1<sup>st</sup> floor of a building only accessible by stairs. If this presents difficulties or if you require additional support during training you must update the **Special Requirements Area** within the Personal section at the top of the My HR and Payroll Home page. This will notify Workforce Development who can plan for your needs.

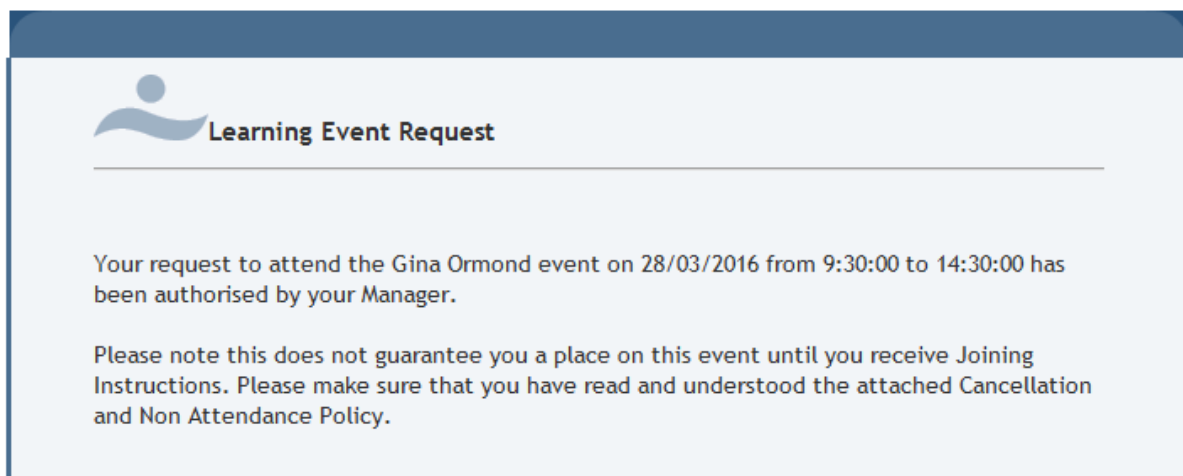
9. If you wish to register your interest in attending please complete the Origin of Request and Reason Details then click Save.



10. If you change your mind at this stage simply click the Cancel button to go back a page. Click Cancel again to take you back to the search list to view other events or click Cancel again to go back to the main page.
11. Confirmation that your request has been received by the system will be in the form of an email similar to the one below.

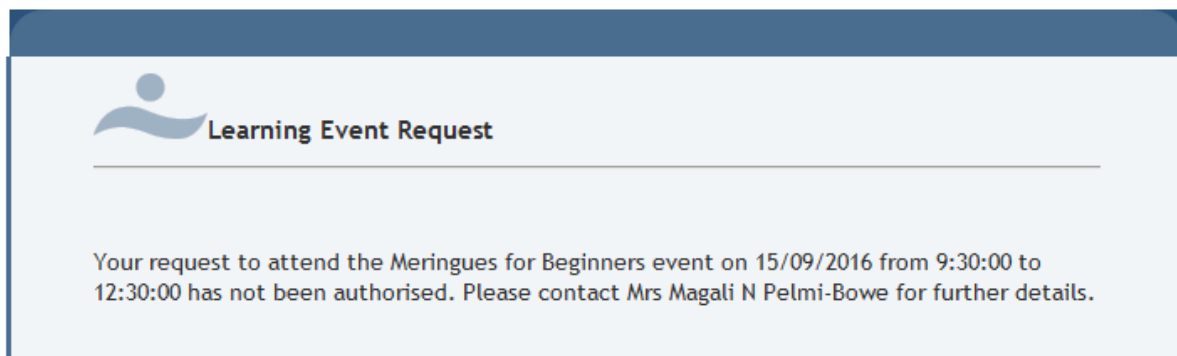


12. When your request has been authorised by your line manager, you should receive e-mails similar to the one below





13. If your request has not been authorised, you should receive e-mails similar to the one below:



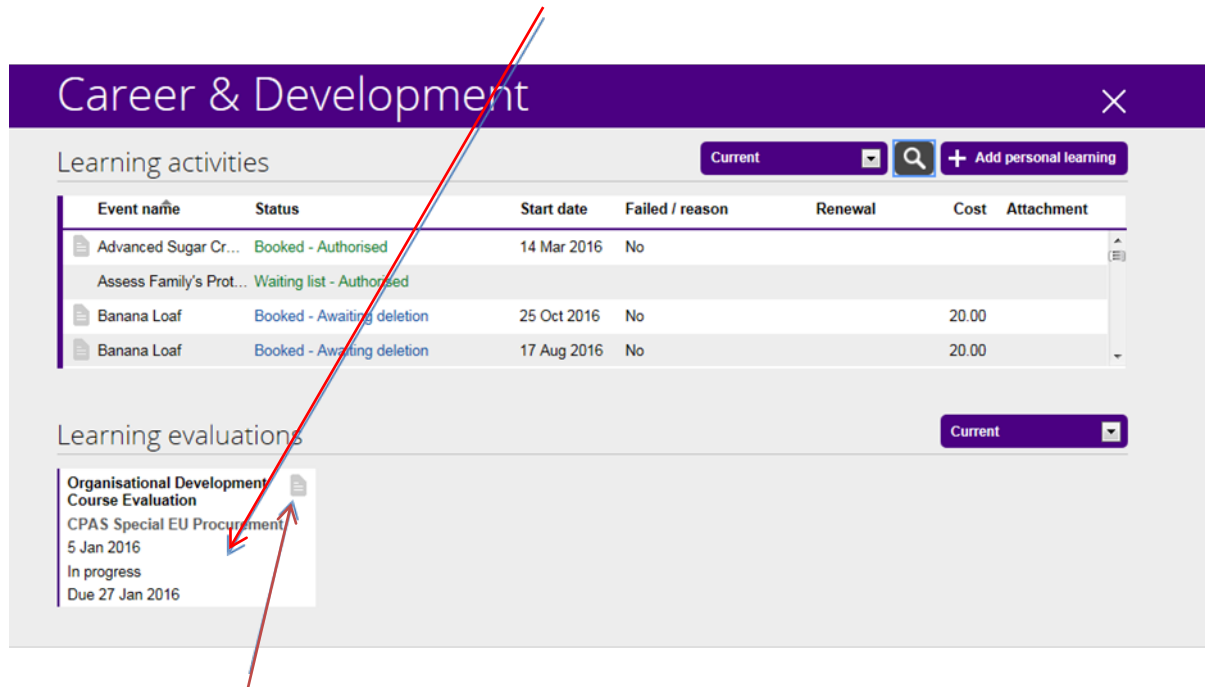
14. Once your request has been authorised by your line manager it will undergo a further authorisation process.

15. If successful you should receive an e-mail containing joining instructions to the event you have applied for – this is the only way your place is confirmed.

**Please do not presume you have a place even though your line manager has authorised your request as most courses are very oversubscribed.**

## COURSE EVALUATION

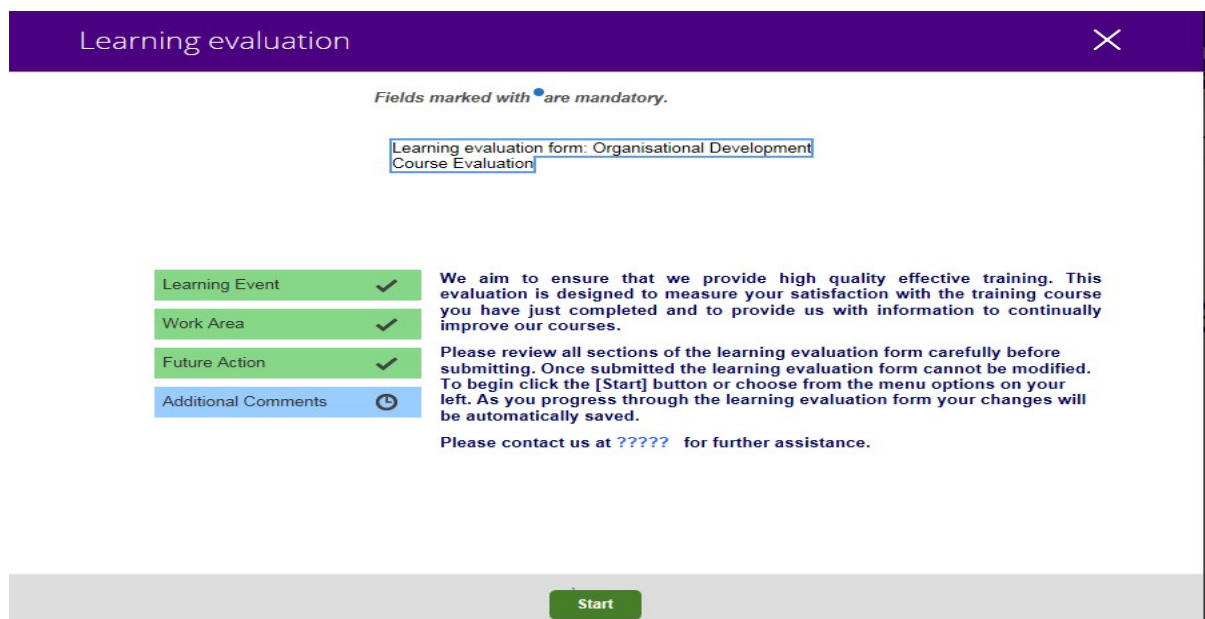
1. After attending a course, you should see a learning evaluation form appear in your Career & Development page:



The screenshot shows the 'Career & Development' interface. At the top, there's a purple header with the title and a close button. Below it, the 'Learning activities' section features a table with columns for Event name, Status, Start date, Failed / reason, Renewal, Cost, and Attachment. The table lists four activities: 'Advanced Sugar Cr...' (Booked - Authorised, 14 Mar 2016), 'Assess Family's Prot...' (Waiting list - Authorised), and two 'Banana Loaf' entries (Booked - Awaiting deletion, 25 Oct 2016 and 17 Aug 2016). Below this is the 'Learning evaluations' section, which shows a card for 'Organisational Development Course Evaluation' with details: 'CPAS Special EU Procurement', '5 Jan 2016', 'In progress', and 'Due 27 Jan 2016'. A document icon in the top left of this card is highlighted with a red arrow.

2. You should click on the document icon in the top left hand corner of the box to open the form.

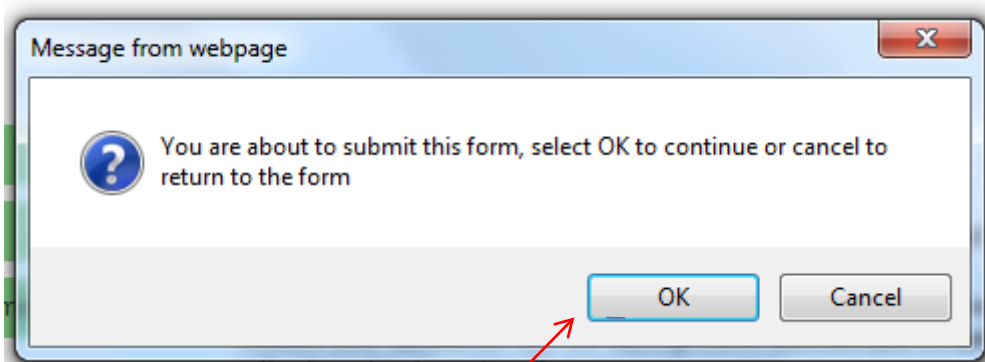
The form will open up as follows:



The screenshot shows the 'Learning evaluation' form. It has a purple header with the title and a close button. Below the header, there's a note: 'Fields marked with \* are mandatory.' The form title is 'Learning evaluation form: Organisational Development Course Evaluation'. On the left, there's a list of sections: 'Learning Event' (green), 'Work Area' (green), 'Future Action' (green), and 'Additional Comments' (blue). To the right of this list, there's a paragraph of text: 'We aim to ensure that we provide high quality effective training. This evaluation is designed to measure your satisfaction with the training course you have just completed and to provide us with information to continually improve our courses. Please review all sections of the learning evaluation form carefully before submitting. Once submitted the learning evaluation form cannot be modified. To begin click the [Start] button or choose from the menu options on your left. As you progress through the learning evaluation form your changes will be automatically saved. Please contact us at ?????? for further assistance.' At the bottom of the form, there's a green 'Start' button.

3. When you have completed the form you should return to this page, where a “submit” button has appeared - select the “submit” button at the bottom of the summary page.

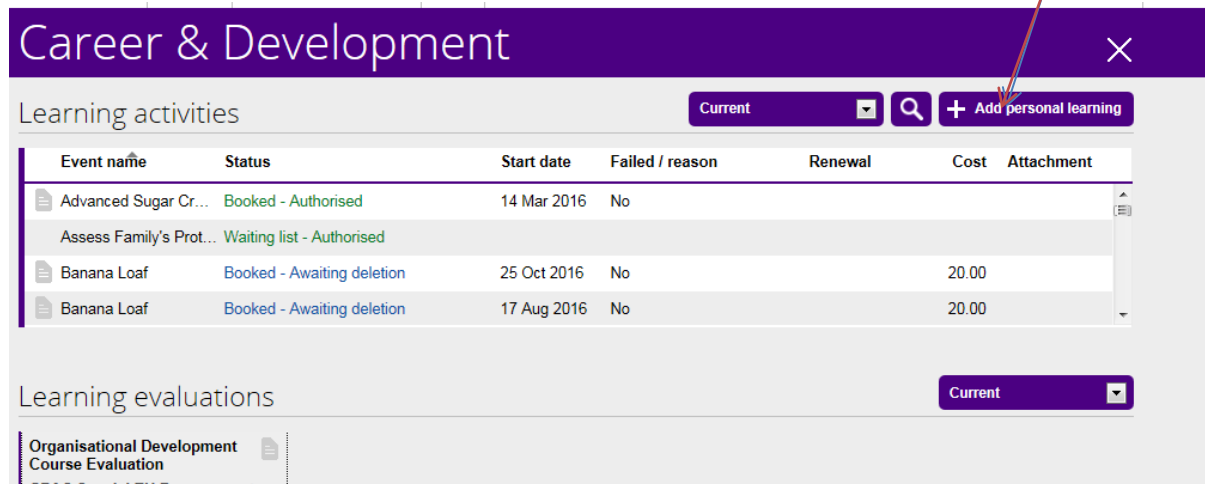
You should see the following message displayed:



Select “OK” to submit the form.

## PERSONAL LEARNING EVENTS

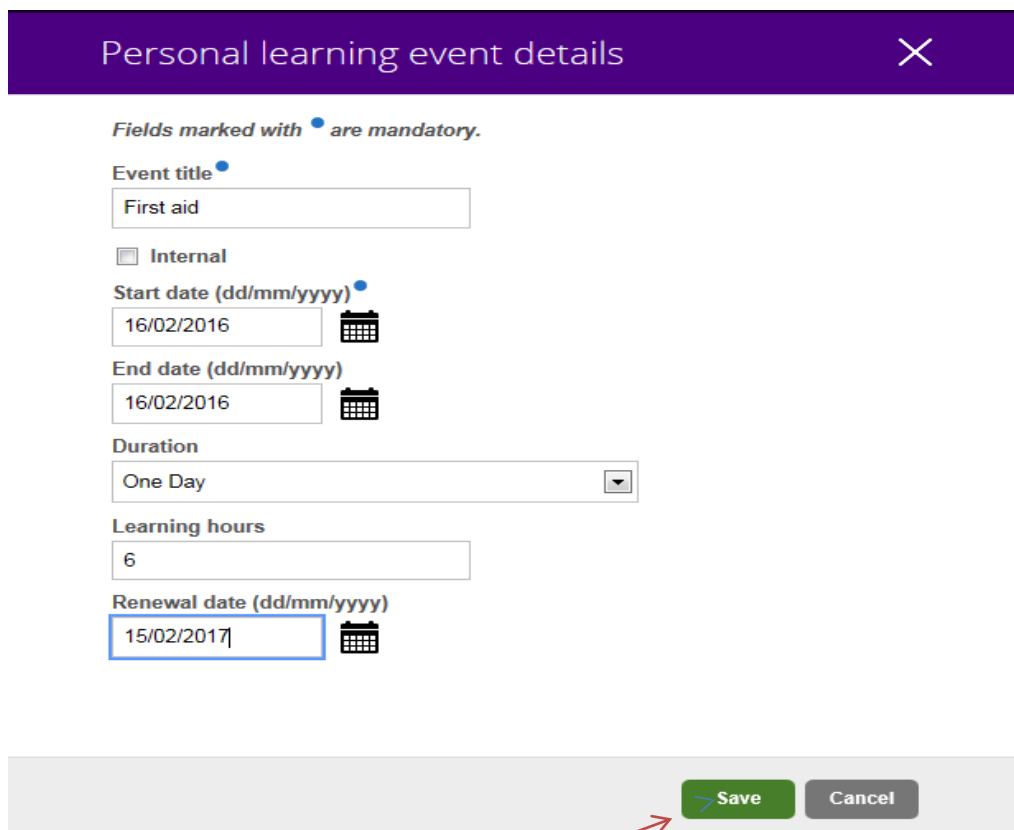
1. There may be occasions when you want to attend a course/conference which is not run by the Council or is an internal session not included as a hosted "course". This can be done by using the "add personal learning" option on the main page:



The screenshot shows the 'Career & Development' interface. At the top, there is a purple header with the text 'Career & Development' and a close button (X). Below the header, there is a section for 'Learning activities' with a 'Current' dropdown menu, a search icon, and a '+ Add personal learning' button. A red arrow points to this button. Below this is a table with the following columns: Event name, Status, Start date, Failed / reason, Renewal, Cost, and Attachment. The table contains four rows of data:

Event name	Status	Start date	Failed / reason	Renewal	Cost	Attachment
Advanced Sugar Cr...	Booked - Authorised	14 Mar 2016	No			
Assess Family's Prot...	Waiting list - Authorised					
Banana Loaf	Booked - Awaiting deletion	25 Oct 2016	No		20.00	
Banana Loaf	Booked - Awaiting deletion	17 Aug 2016	No		20.00	

Below the table is a section for 'Learning evaluations' with a 'Current' dropdown menu. At the bottom, there is a list of items including 'Organisational Development Course Evaluation' and 'CPAS Social Fil Document'.



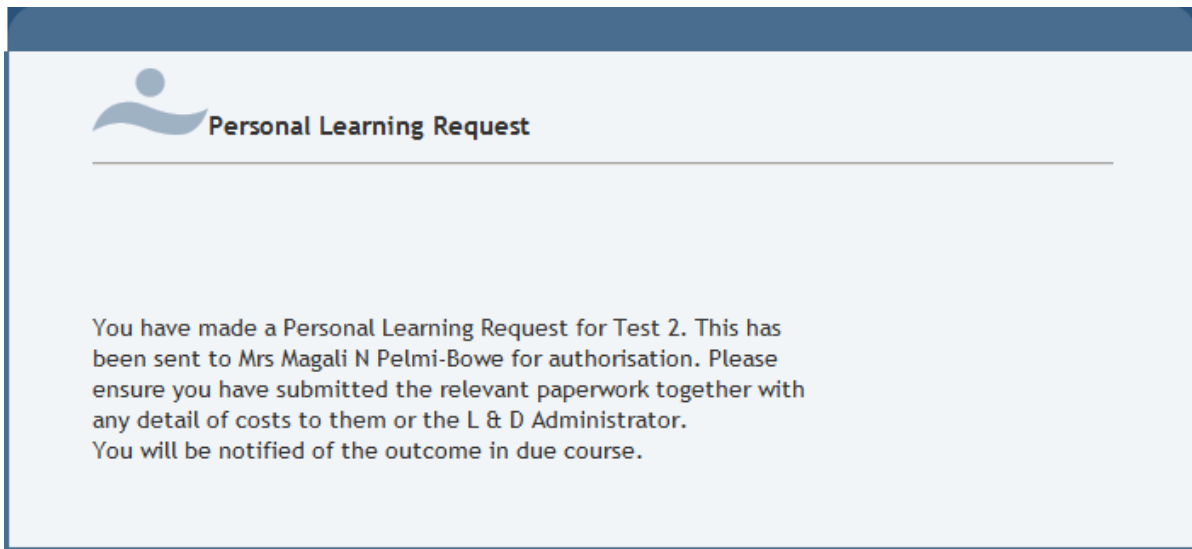
The screenshot shows the 'Personal learning event details' form. At the top, there is a purple header with the text 'Personal learning event details' and a close button (X). Below the header, there is a note: 'Fields marked with • are mandatory.' The form contains the following fields:

- Event title •: Text input field containing 'First aid'.
- Internal: Checkbox.
- Start date (dd/mm/yyyy) •: Date input field containing '16/02/2016' with a calendar icon.
- End date (dd/mm/yyyy): Date input field containing '16/02/2016' with a calendar icon.
- Duration: Dropdown menu with 'One Day' selected.
- Learning hours: Text input field containing '6'.
- Renewal date (dd/mm/yyyy): Date input field containing '15/02/2017' with a calendar icon.

At the bottom of the form, there are two buttons: 'Save' (green) and 'Cancel' (grey). A red arrow points to the 'Save' button.

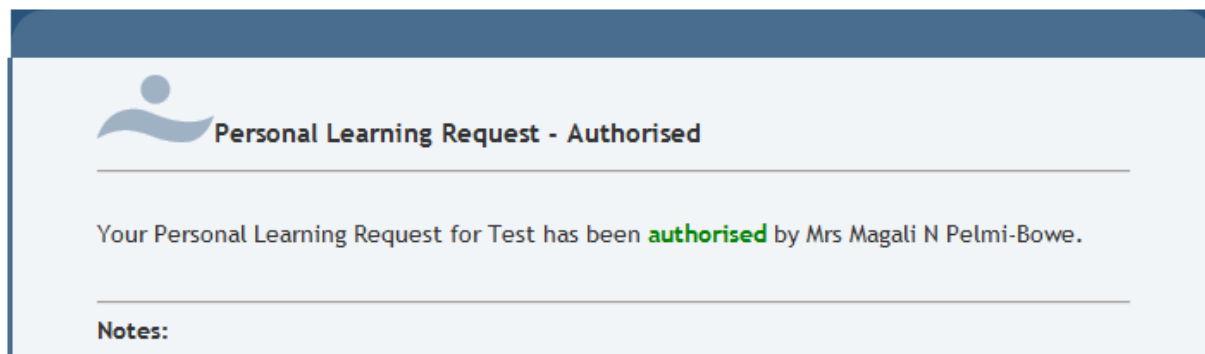
2. You should complete this form with details of the course. When finished, you should select the "save" option at the bottom of the page. This will then be sent for authorisation to your line manager.

3. You should receive an e-mail notification similar as follows. You will be required to submit evidence of your attendance to your manager.

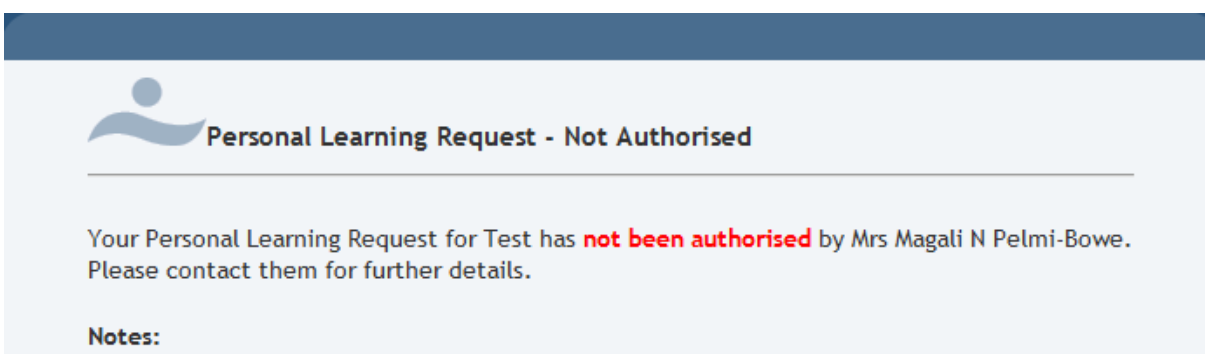


The image shows a screenshot of an email notification. At the top left, there is a blue icon of a person with arms raised, followed by the text "Personal Learning Request". A horizontal line separates the header from the main body of the email. The main body contains the following text: "You have made a Personal Learning Request for Test 2. This has been sent to Mrs Magali N Pelmi-Bowe for authorisation. Please ensure you have submitted the relevant paperwork together with any detail of costs to them or the L & D Administrator. You will be notified of the outcome in due course."

4. You will then receive an e-mail once this has been authorised or not authorised as follows:



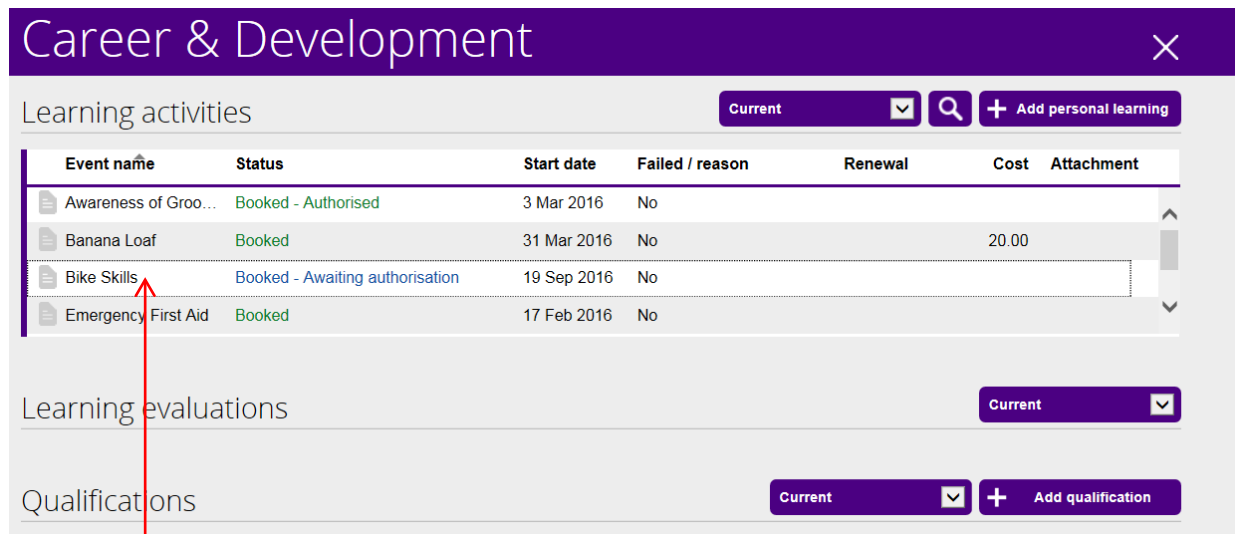
The image shows a screenshot of an email notification. At the top left, there is a blue icon of a person with arms raised, followed by the text "Personal Learning Request - Authorised". A horizontal line separates the header from the main body of the email. The main body contains the following text: "Your Personal Learning Request for Test has been **authorised** by Mrs Magali N Pelmi-Bowe." Below this text is another horizontal line, followed by the word "Notes:".



The image shows a screenshot of an email notification. At the top left, there is a blue icon of a person with arms raised, followed by the text "Personal Learning Request - Not Authorised". A horizontal line separates the header from the main body of the email. The main body contains the following text: "Your Personal Learning Request for Test has **not been authorised** by Mrs Magali N Pelmi-Bowe. Please contact them for further details." Below this text is another horizontal line, followed by the word "Notes:".

## CANCELLING YOUR COURSE

1. If you no longer require a course, you can cancel it by going to the course booking details page:

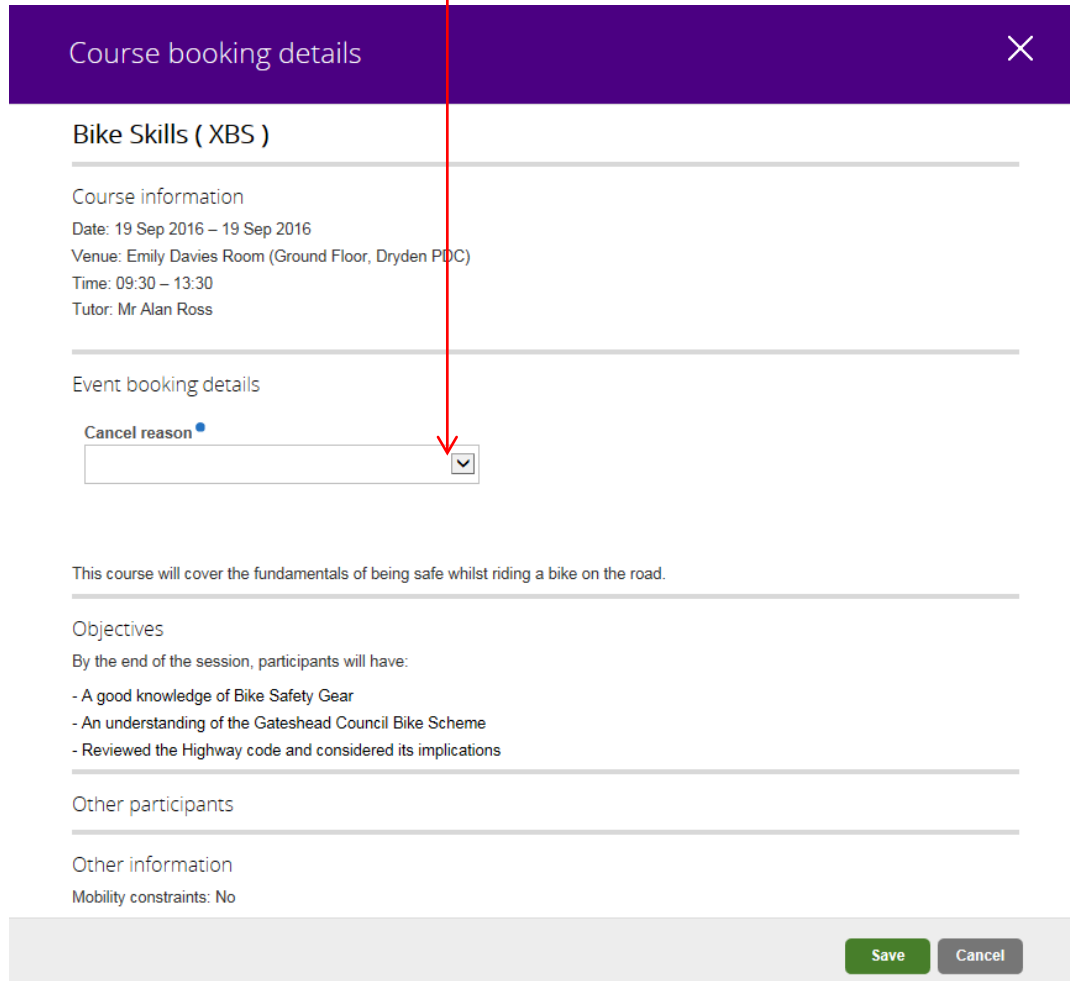


The screenshot shows the 'Career & Development' interface. At the top, there is a purple header with the text 'Career & Development' and a close button. Below the header, there are three sections: 'Learning activities', 'Learning evaluations', and 'Qualifications'. Each section has a 'Current' button and a search icon. The 'Learning activities' section contains a table with the following data:

Event name	Status	Start date	Failed / reason	Renewal	Cost	Attachment
Awareness of Groo...	Booked - Authorised	3 Mar 2016	No			
Banana Loaf	Booked	31 Mar 2016	No		20.00	
Bike Skills	Booked - Awaiting authorisation	19 Sep 2016	No			
Emergency First Aid	Booked	17 Feb 2016	No			

A red arrow points to the 'Bike Skills' row in the table.

2. Click on the event you want to cancel which will be listed under learning activities which will take you to the next screen. You should enter a cancellation reason by using the drop down box.



The screenshot shows the 'Course booking details' page for 'Bike Skills ( XBS )'. The page has a purple header with the text 'Course booking details' and a close button. Below the header, there are several sections:

- Course information**  
Date: 19 Sep 2016 – 19 Sep 2016  
Venue: Emily Davies Room (Ground Floor, Dryden PDC)  
Time: 09:30 – 13:30  
Tutor: Mr Alan Ross
- Event booking details**  
Cancel reason
- Other participants**
- Other information**  
Mobility constraints: No

A red arrow points to the 'Cancel reason' dropdown menu.

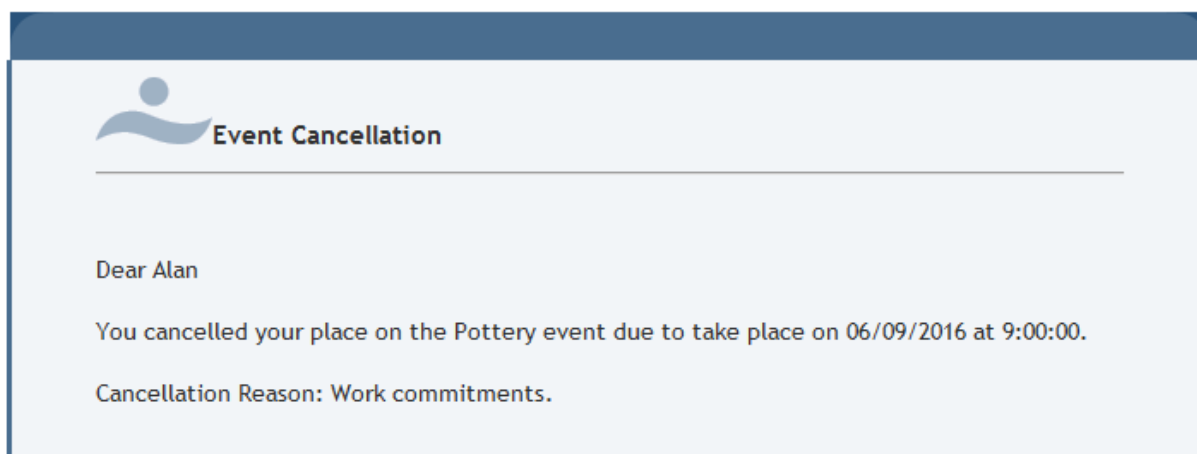
This course will cover the fundamentals of being safe whilst riding a bike on the road.

**Objectives**  
By the end of the session, participants will have:

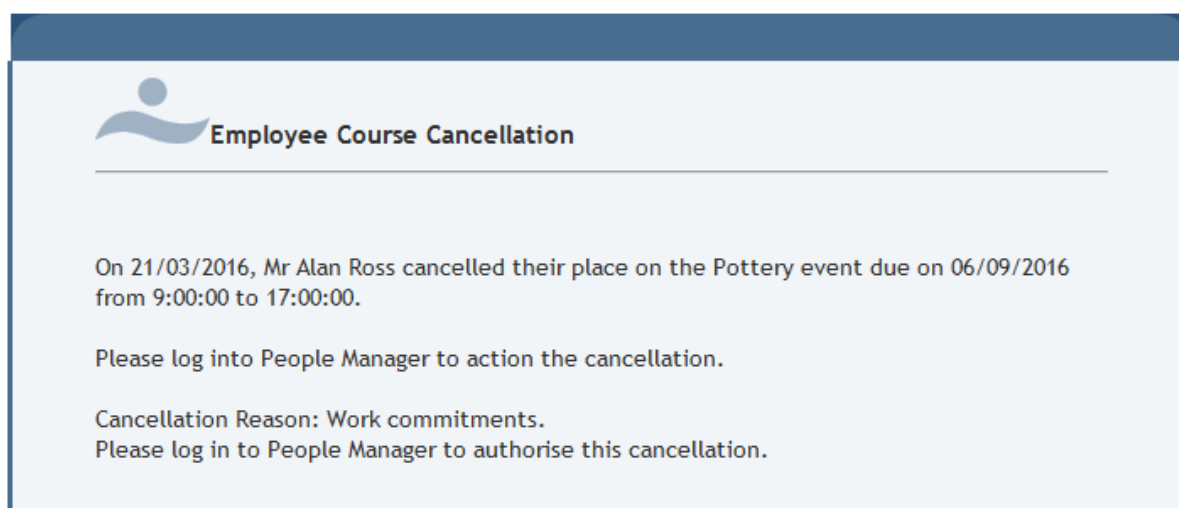
- A good knowledge of Bike Safety Gear
- An understanding of the Gateshead Council Bike Scheme
- Reviewed the Highway code and considered its implications

At the bottom of the page, there are two buttons: 'Save' and 'Cancel'.

3. When you have finished entering the details, select the “save” button at the bottom of the page. You should receive an e-mail confirmation of the cancellation.



4. Your Manager will also receive an email similar to the one below.



5. On occasions courses may have to be changed/updated/cancelled – if this happens you will always be contacted by e-mail.