

CoreHR guide for Managers

Delegate Access Set-up

The guide on how to delegate system access to another individual in CoreHR. Delegated Access will allow another user to complete manager actions on your behalf (e.g. approving leave, recording sickness absence, etc.)

IMPORTANT: Delegated Access Information

Who can be granted Delegated Access?

Delegated Access can only be granted to employees who are People Managers. Only employees who already have access to a Manager Dashboard can be given delegated access.

What will individuals have access to?

Individuals who you have granted Delegated Access to will be able to view **ALL** the same information on your team members that you currently have access to.

When should I activate Delegated Access?

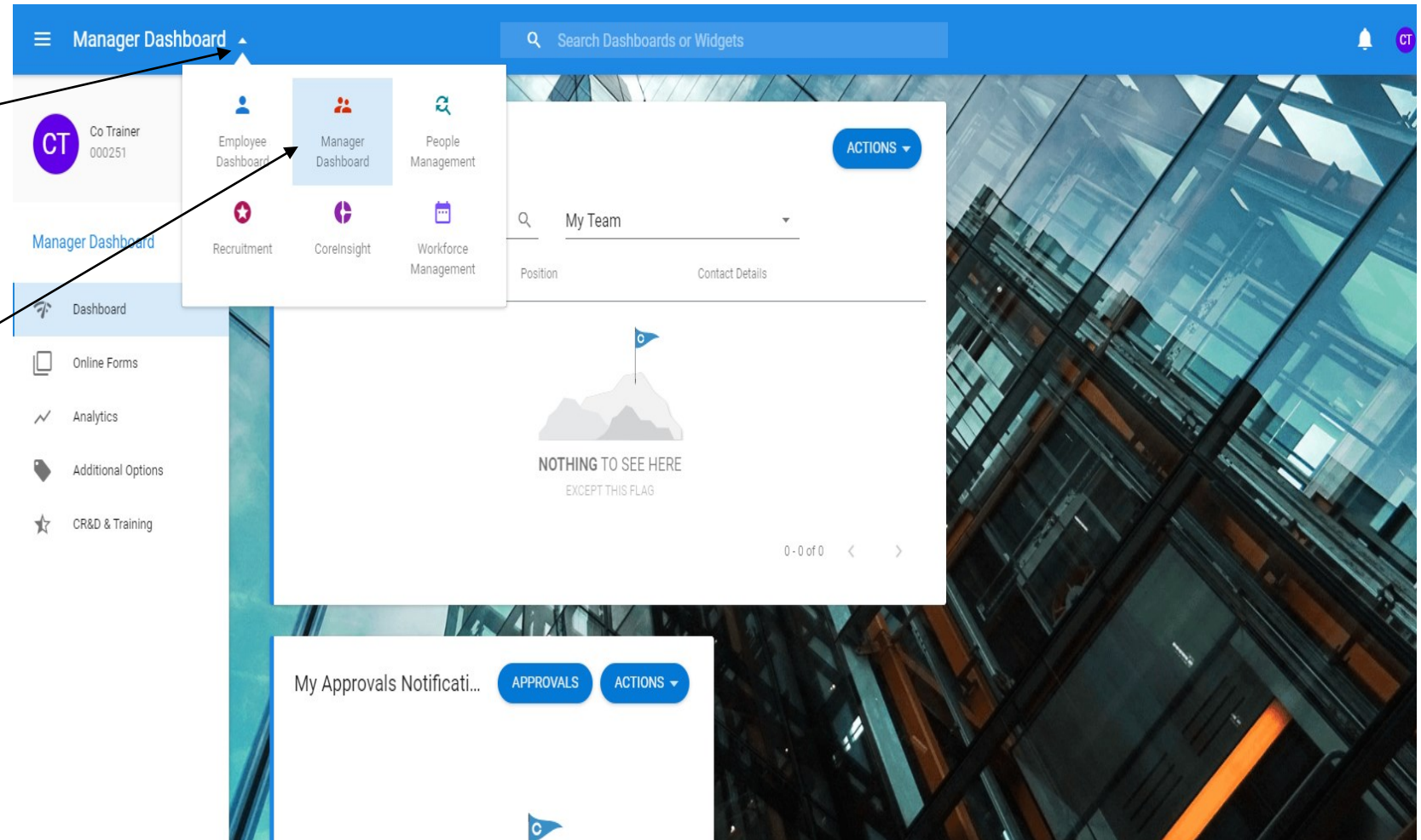
The delegation of access must be set **EVERYTIME** a manager goes on leave (i.e. much the same as setting an out of office). If you **do not** set Delegated Access, then no approvals will be processed whilst you are on leave.

When can I send you Delegated Access?

Delegated Access can be set up any time up to the date it is required. For open-ended Delegated Access, you will only need to set this up once and the individual will have ongoing Delegated Access.

Manager Dashboard

Once you are logged into the portal, click on the drop down Arrow to view the menu with different dashboards. Select the **Manager Dashboard**.



Viewing Direct Reports For Your Team Members

The screenshot shows the 'Manager Dashboard' interface. At the top, there's a blue header with 'Manager Dashboard' and a search bar. On the left, a sidebar lists navigation options: 'T2 Talent Manager 2 000260', 'Manager Dashboard', 'Dashboard', 'Online Forms', 'Analytics', 'Additional Options', and 'CR&D & Training'. The main content area features a 'My Team' box with a table of team members. The table has columns for 'Employee', 'Position', and 'Contact Details'. Below the table, there's a 'My Approvals Notificati...' section with 'APPROVALS' and 'ACTIONS' buttons. At the bottom left, there's a 'corehr' logo and a message 'NOTHING TO SEE HERE EXCEPT THIS FLAG'.

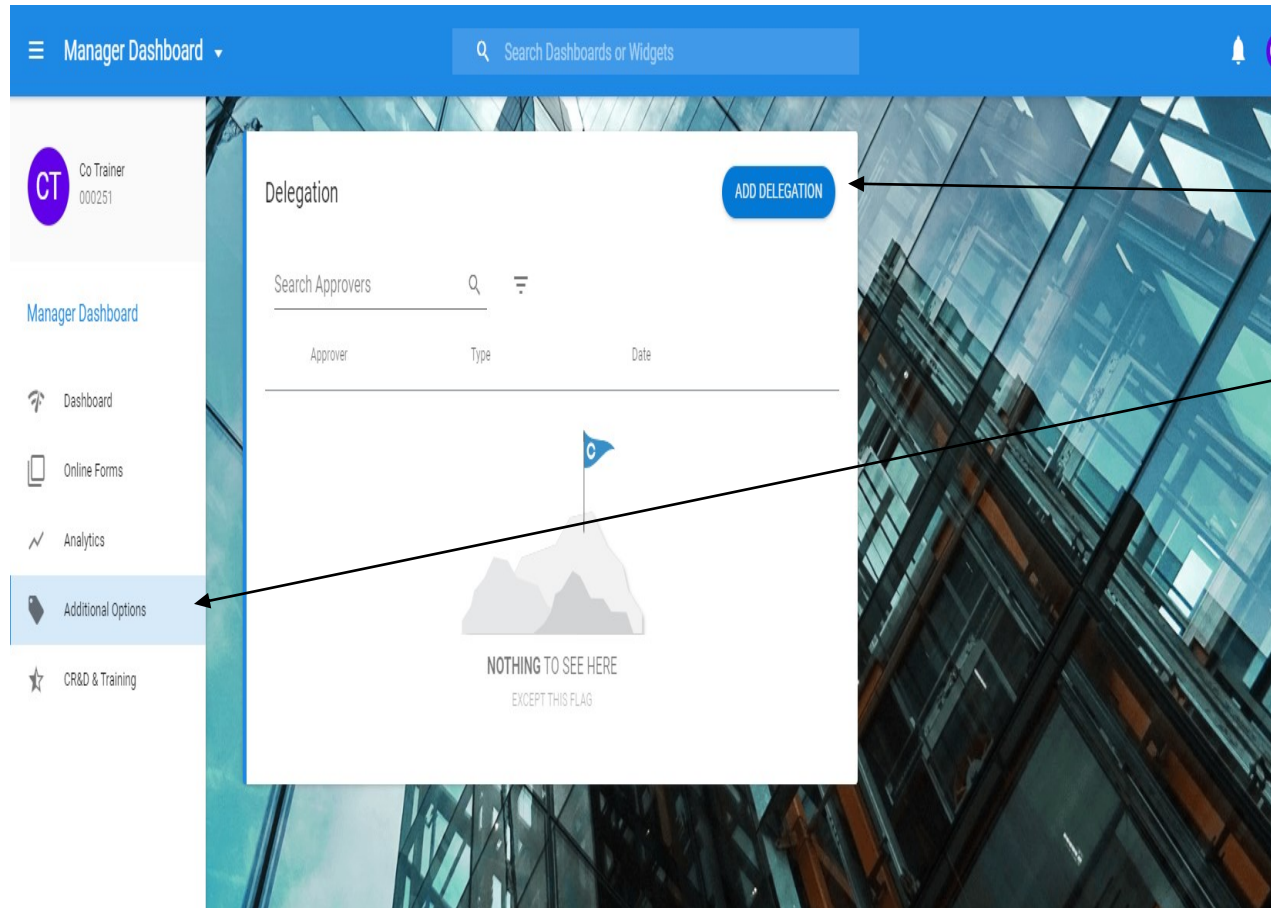
Employee	Position	Contact Details
Talent Employee 000274	Housing Access And Support Admin Assistant	None Set
Talent Employee 000278	Transactions And Business Sup... Admin Officer	None Set
Talent Employee 3 000255	Transactions And Business Sup... Admin Officer	None Set

Delegation can be set up both to individuals in your team and individuals outside your team.

To set up delegation to an individual in your team, go to the **My Team Box**.

Please note – You can click on [...] and Select **View Team** to view all direct reports for one of your team members.

Delegating Access To Other Managers



Click on the **Additional Options Tab** to be taken to the screen where you can delegate access to an individual outside of your current team.


Delegating Access To Other Managers

← Manager Dashboard

Add Approver Delegation

Manager Dashboard > Add Approver Delegation

Type*
Org Role| ▾ From Date* 

Delegate To* ▾ To Date 

Reason

☐ I authorise this individual to approve on my behalf

Org Role Name Number Of Employees

On the **Add Approver Delegation Screen**, please complete the following boxes:

- **Type** – select Org Role.
- **From Date** – Start of the access.
- **To Date** – Date the access will end.
- **Delegate to** – Select the name of the individual delegating access to. For open-ended Delegated Access, please leave this blank.
- **Reason** – Add in reason for delegating access.
- Individuals can approve actions on your behalf when this is turned **On**. This can be for approving leave, recording an absence, etc.

Delegating Access To Other Managers

← Manager Dashboard

Add Approver Delegation

Manager Dashboard > Add Approver Delegation

Type*
Org Role

From Date*
12-Nov-2019

Delegate To*
Talent Manager 6

To Date
15-Nov-2019

Reason
On Leave

☒ I authorise this individual to approve on my behalf

Org Role Name	Number Of Employees
Reports to	3

[SHOW EMPLOYEES](#)

[SAVE](#)

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After selecting the manager you would like to delegate access to, you can select the **Show Employees Button** to view the names of the employees that the manager will have access.

Delegating Access To Other Managers

The screenshot shows a web interface for 'Add Approver Delegation'. At the top is a blue header bar with a back arrow and the text 'Add Approver Delegation'. Below this is a section titled 'List of Employees' with a breadcrumb trail: 'Manager Dashboard > Add Approver Delegation* > List of Employees'. A search bar is present. Below the search bar is a table with four columns: Name, Department, Mobile, and Email. The table contains three rows of employee data. At the bottom right of the table area, there is a pagination indicator '1 - 3 of 3' with left and right arrows. The 'corehr' logo is at the bottom center.

Name	Department	Mobile	Email
Talent Employee Admin Assistant	Housing Access And Support	None Set	None Set
Talent Employee Admin Officer	Transactions And Business Support	None Set	None Set
Talent Employee 3 Admin Officer	Transactions And Business Support	None Set	None Set

Once you have viewed these employees, you can return to the previous screen by selecting the **Arrow Button**.

Delegating Access To Other Managers

← Manager Dashboard

Add Approver Delegation

Manager Dashboard > Add Approver Delegation

Type*
Org Role ▼

From Date*
12-Nov-2019

Delegate To*
▼

To Date
19-Nov-2019

Reason
On Leave

☒ I authorise this individual to approve on my behalf

Org Role Name

Number Of Employees

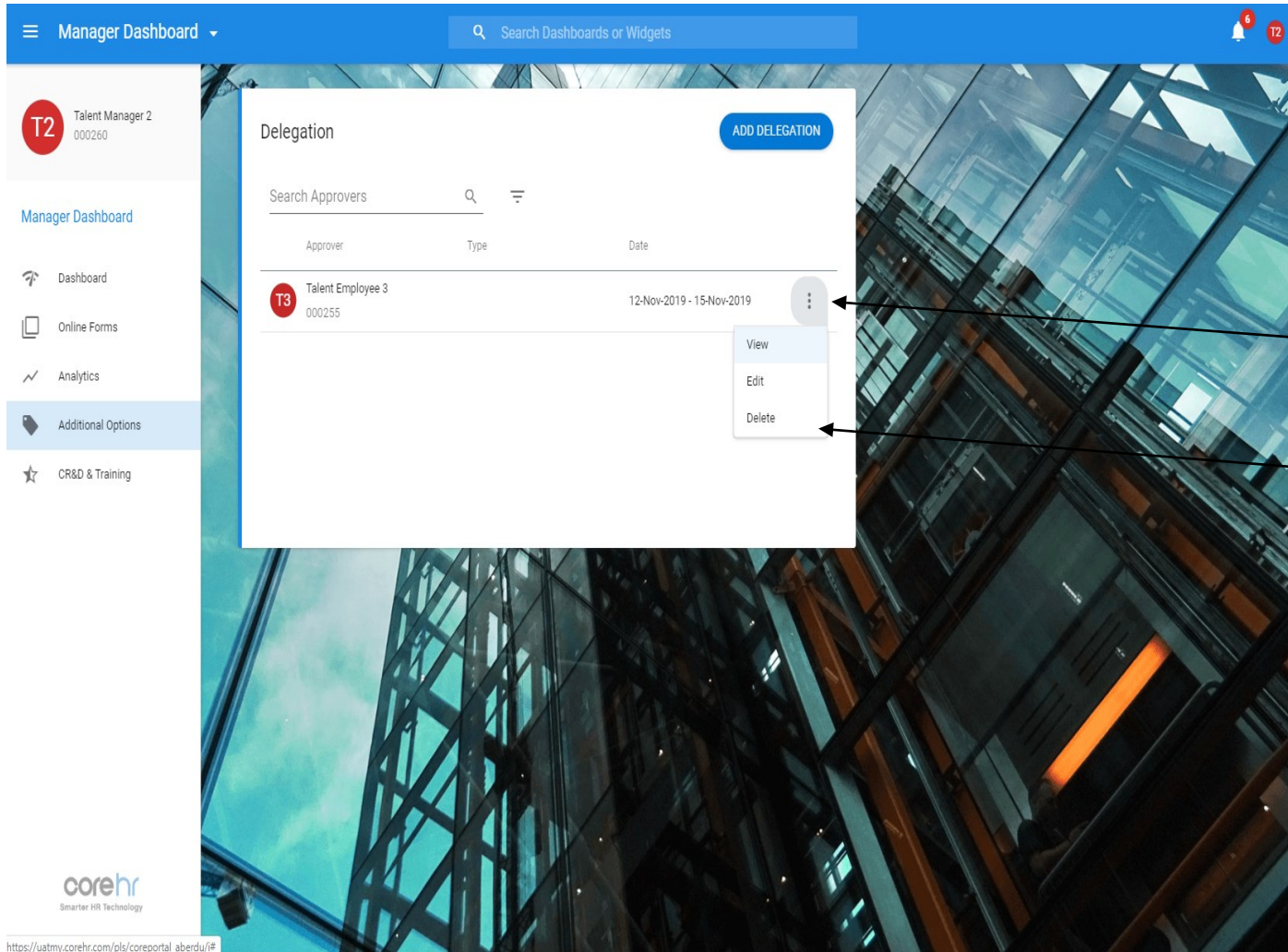
NOTHING TO SEE HERE
EXCEPT THIS FLAG

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SAVE

Once you have checked these details please select **Save** when the Form is completed to action.

Deleting Delegated Access Individual



The screenshot displays the CoreHR Manager Dashboard. On the left, a sidebar contains navigation links: Manager Dashboard, Dashboard, Online Forms, Analytics, Additional Options, and CR&D & Training. The main content area is titled 'Delegation' and features a table with columns for Approver, Type, and Date. A search bar for 'Search Approvers' is at the top of the table. An 'ADD DELEGATION' button is in the top right corner. The table lists one entry: 'Talent Employee 3' (ID 000255) with a delegation period of '12-Nov-2019 - 15-Nov-2019'. A three-dot menu is visible next to this entry, with a dropdown menu open showing 'View', 'Edit', and 'Delete' options. Arrows from the text on the right point to the three-dot menu and the 'Delete' option.

Approver	Type	Date
Talent Employee 3 000255		12-Nov-2019 - 15-Nov-2019

To delete delegated access to an employee, please click [...] button and click **Delete**. The individual will then be deleted from this list.

Set up Delegated Access – Available Actions

The screenshot displays the 'Manager Dashboard' interface. At the top, there's a blue header with a search bar and a notification bell. The left sidebar contains navigation links: 'Manager Dashboard', 'Dashboard', 'Online Forms', 'Analytics', 'Additional Options', and 'CR&D & Training'. The main content area is divided into two sections. The top section, titled 'My Team', features a table with columns for 'Name, Department, Job Title', 'Position', and 'Contact Details'. It lists three team members: 'Talent Employee 000274' (Admin Assistant), 'Talent Employee 000278' (Admin Officer), and 'Talent Employee 3 000255' (Admin Officer). An 'ACTIONS' dropdown menu is open, showing options like 'View Scheduler' and 'Transfers'. The bottom section, titled 'My Approvals Notificati...', shows a 'NOTHING TO SEE HERE' message with a flag icon. The 'corehr' logo is visible in the bottom left corner.

Name, Department, Job Title	Position	Contact Details
Talent Employee 000274	Housing Access And Support Admin Assistant	None Set
Talent Employee 000278	Transactions And Business Sup... Admin Officer	None Set
Talent Employee 3 000255	Transactions And Business Sup... Admin Officer	None Set

If you manage managers, you will be able to view teams of other managers if you have Delegated Access. You will also be able to complete certain actions on their behalf.

You can complete these actions for team members of other teams on the main **Dashboard Tab**. These actions can include the following:


- Approving, Rejecting and Logging Annual Leave.
- Recording, Updating and Closing Absences.
- Viewing any notifications and actioning any approvals that require your attention.


To log leave against team members that you have Delegated Access to, click on **Action** option here and click on the **View Scheduler Option**.

Delegated Access – View Scheduler





← Manager Dashboard

Team Scheduler
Manager Dashboard > Team Scheduler

Search Employees 

Date: 04-Nov-2019  < > **WEEK** MONTH

Period: 201945

Team Member	Mon 4th	Tue 5th	Wed 6th	Thu 7th	Fri 8th	Sat 9th	Sun 10th
 Talent Employee Admin Assistant Housing Access And Support	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	Resting	Resting
 Talent Employee Admin Officer Transactions And Business Support	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	Resting	Resting
 Talent Employee 2 Admin Officer Transactions And Business Support							
 Talent Employee 3 Admin Officer Transactions And Business Support	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	Resting	Resting

1 - 4 of 4 < >

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On the **View Scheduler Page**, you will be able to see team members from other teams from your Delegated Access.

This will also be the same for individuals who you have Delegated Access to.

From the **View Scheduler Page**, you will be able to record, update and close sickness for all individuals which you have Delegated Access for.

For details on how to carry out sickness absence actions, please refer to the **Manager – Managing Sickness Guide**, which can be found on the CoreHR People Anytime Page – <https://peopleanytime.aberdeencity.gov.uk/corehr/>