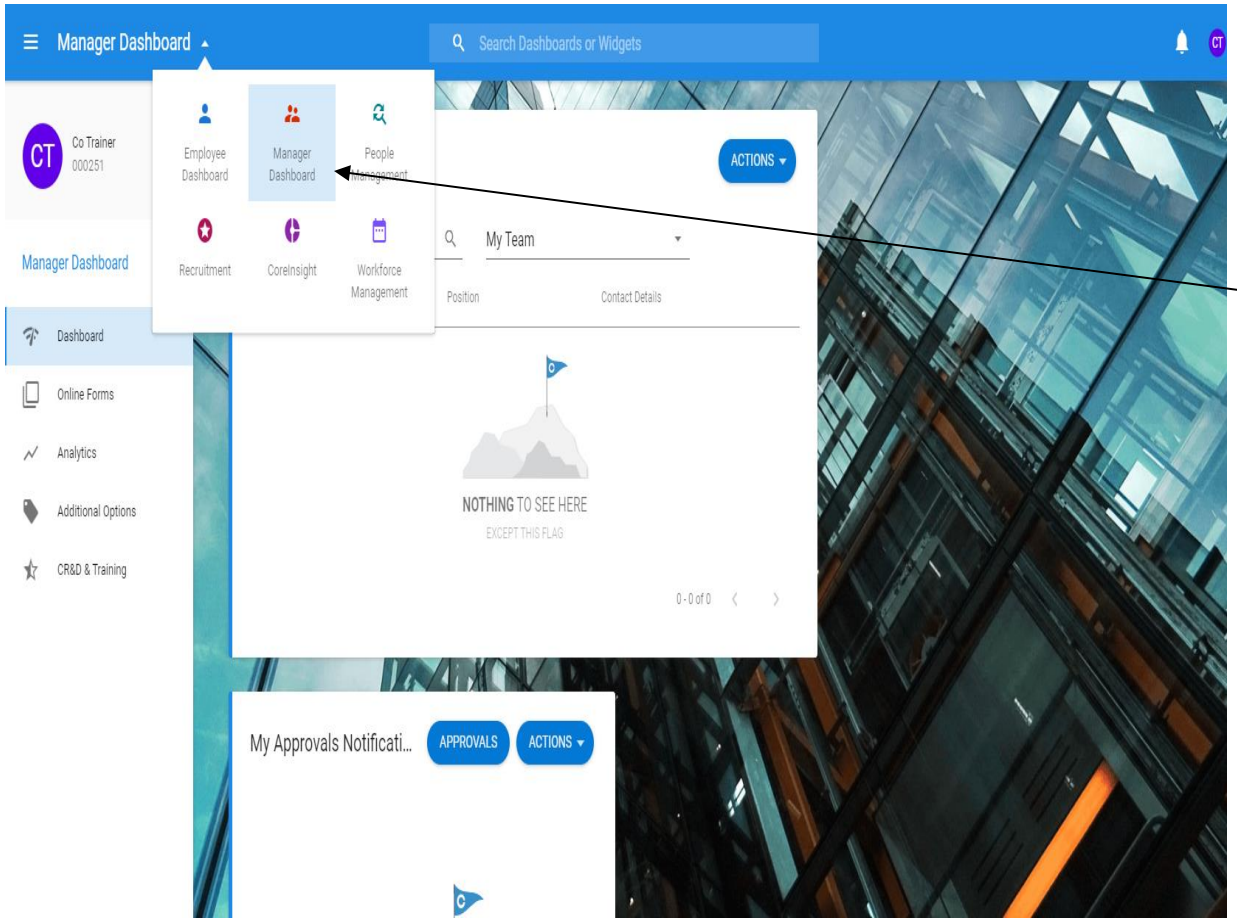
CoreHR Guide
Logging & Approving Your Team's Leave

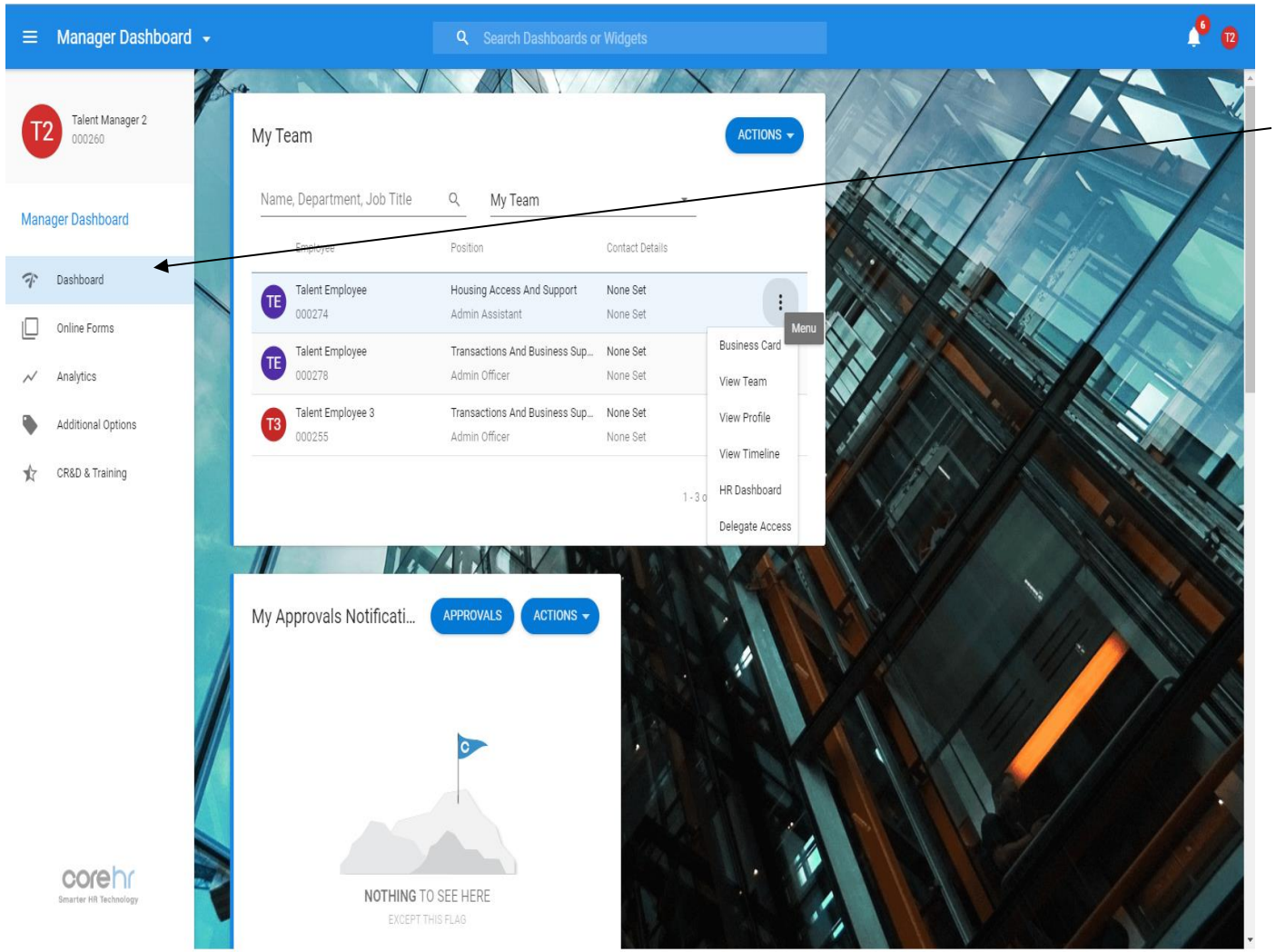
This guide will explain how to log, approve or reject leave requests, including Annual Leave, Special Leave (Paid) and Special Leave (Unpaid), as well a view your team's calendar.

Manager Dashboard



Click on the **Drop-down Arrow** and you will see a selection of dashboards. Go to **Manager Dashboard**.

Viewing the Team's Information



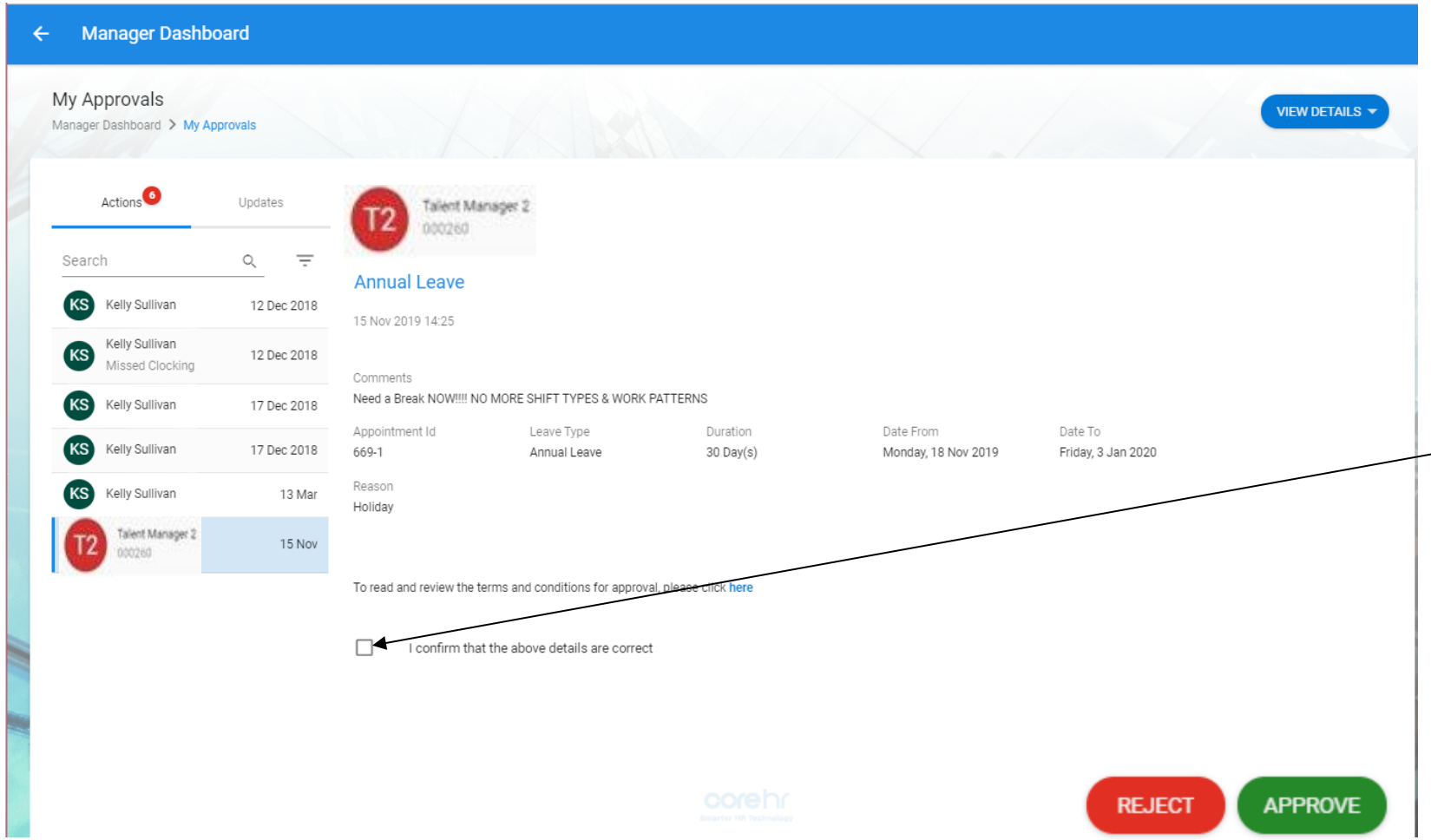
Make sure you are on the Dashboard Tab on the left hand side.

You can view a list of your team members here.

You can also view any outstanding requests in the **My Approvals Section.**

This will come through as a **Red Bell** at the top right of the screen and through email notifications.

Viewing Leave Requests

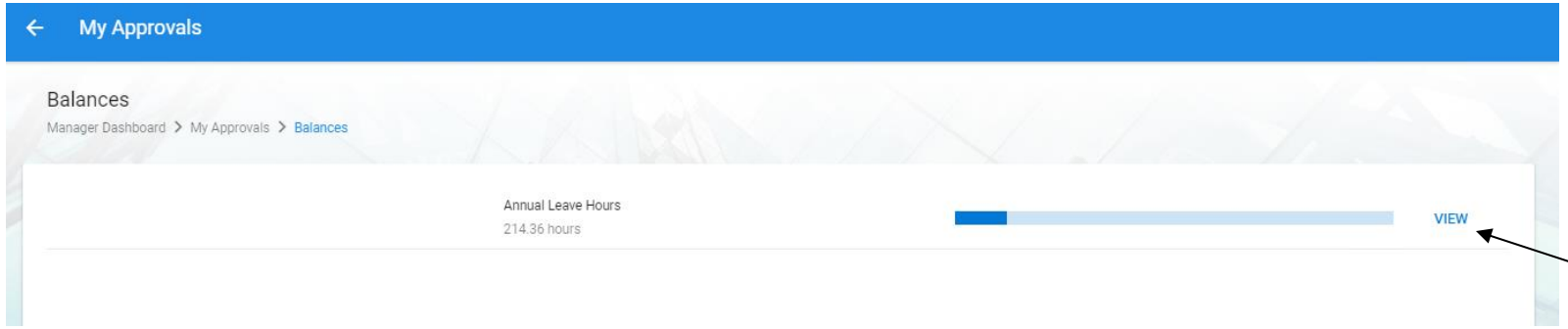


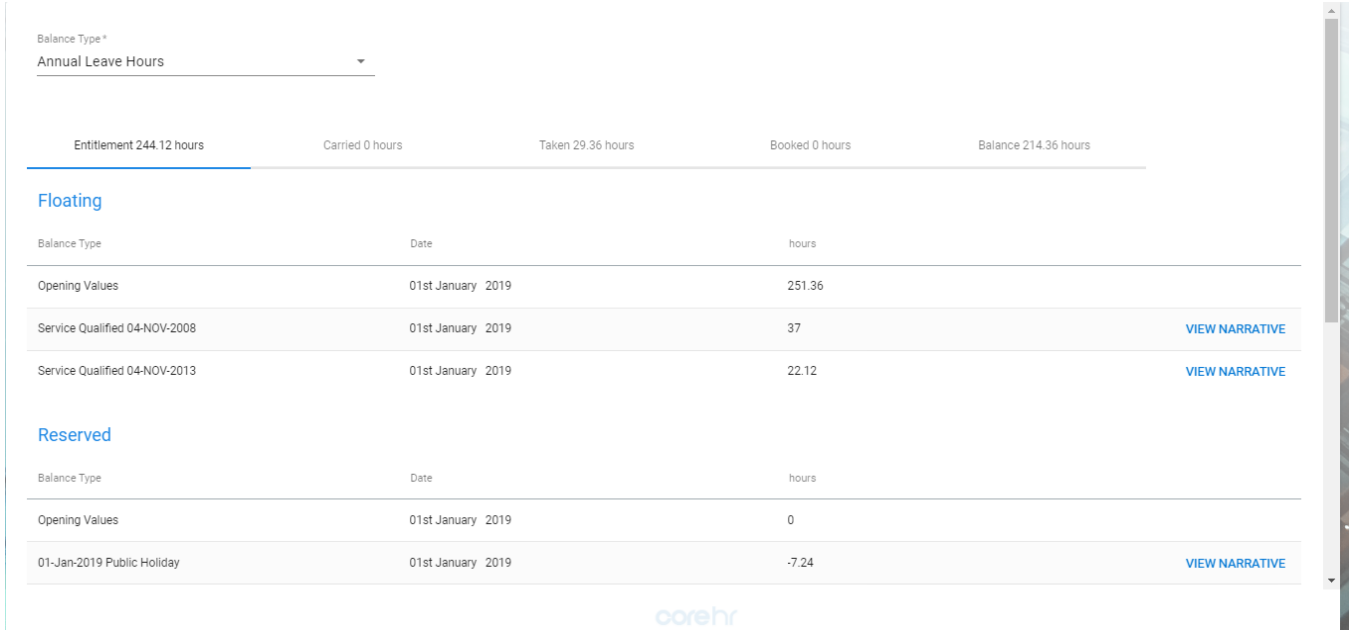
When you click on the leave request in the **My Approvals Section**, you will be taken to this screen.

All Leave Requests will appear on this screen where you can approve / reject / etc. Click this box, then Reject or Approve to approve / reject the request.

Click on View details to view the employee's leave balance or your team's calendar.

Checking employee's leave balance





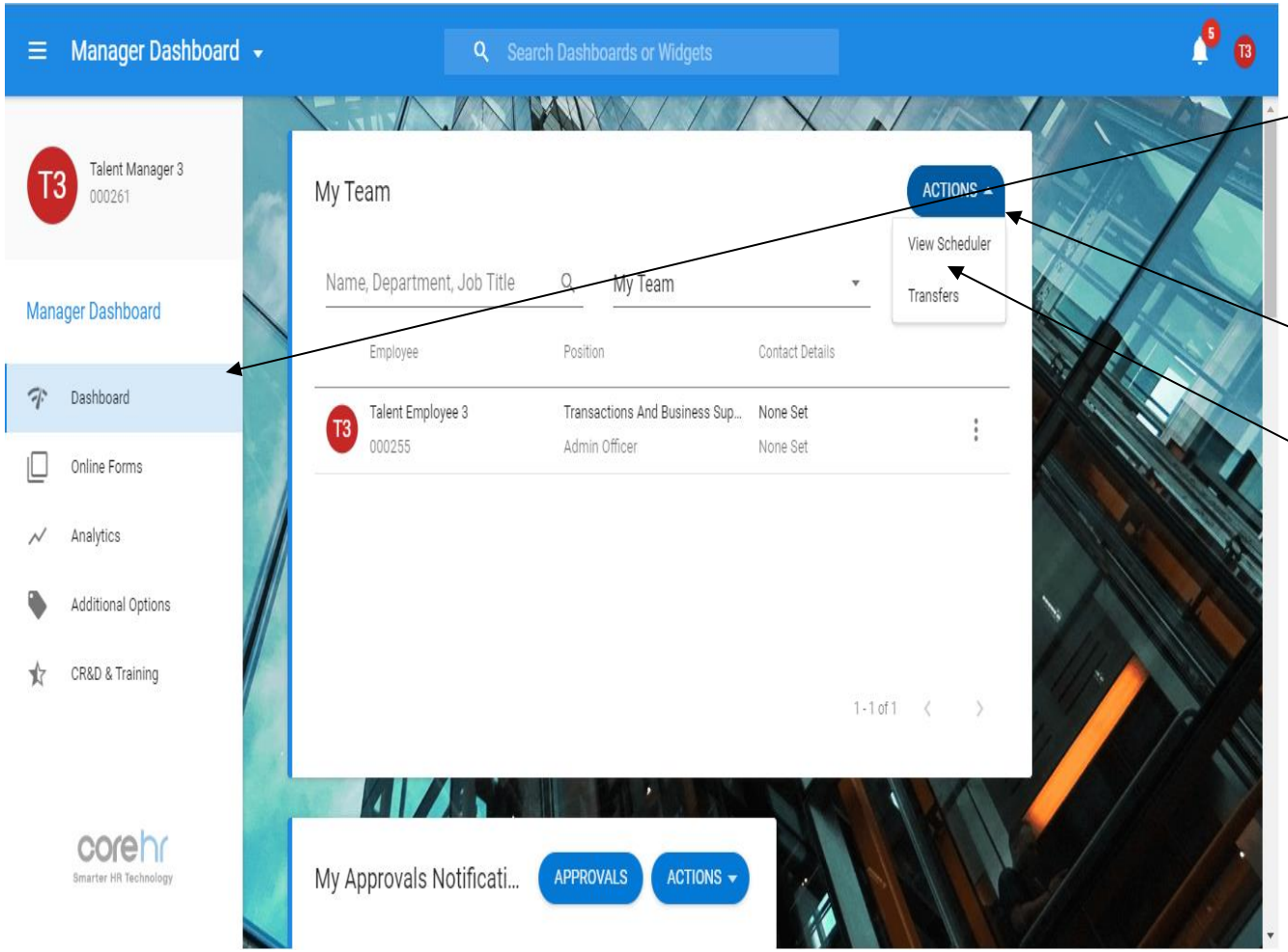
Select **Balances** to see an overview of the employee's annual leave balance. You can click view to see this in more detail.

The balance screen will give you the full detail of the employee's leave balance, including leave taken, carried forward, additional leave, etc.

Click the back button to return to the approval screen.

Entering leave requests on behalf of employees
who do not have access to CoreHR

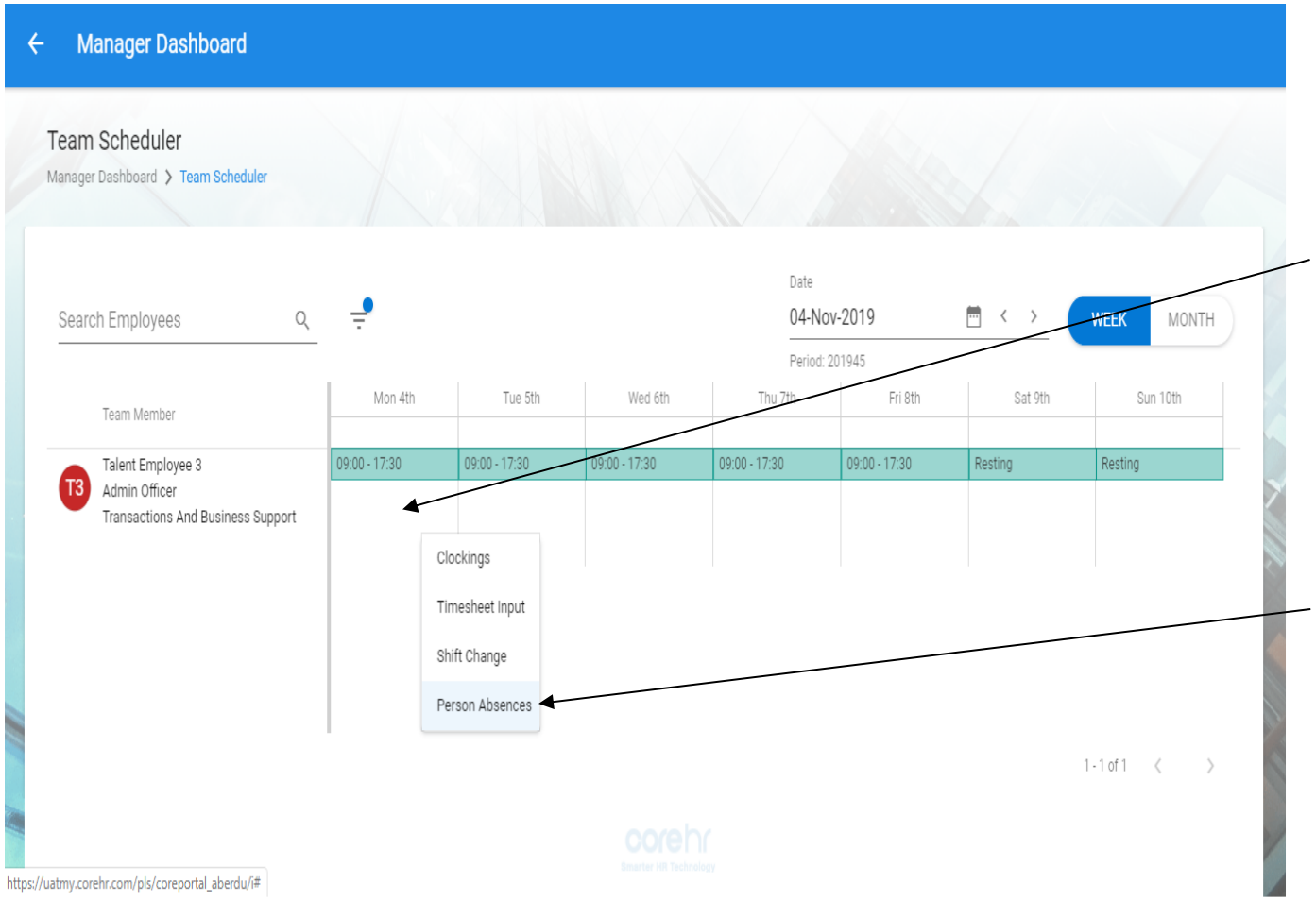
Entering Leave for Employees



Make sure you are on the **Dashboard** tab on the left-hand side.

You can view your team's scheduler by clicking on the Drop-Down Arrow beside the **Action Button** and selecting the **View Scheduler** option.

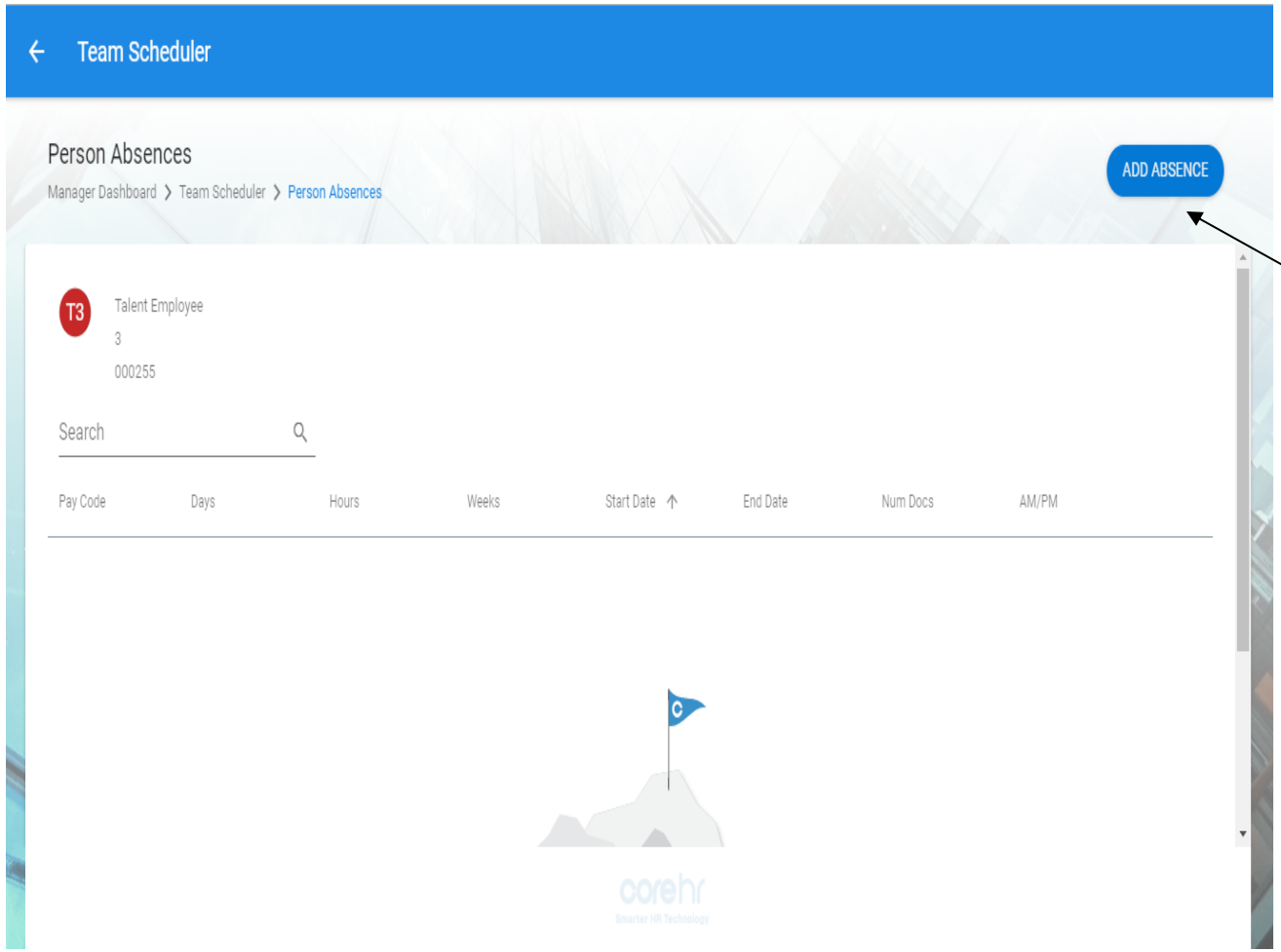
Scheduler Screen



Once you are in the Scheduler Form, click on a space under the relevant date you want to add the leave to for that employee. Please note – this is on the white space, not on the marked green area.

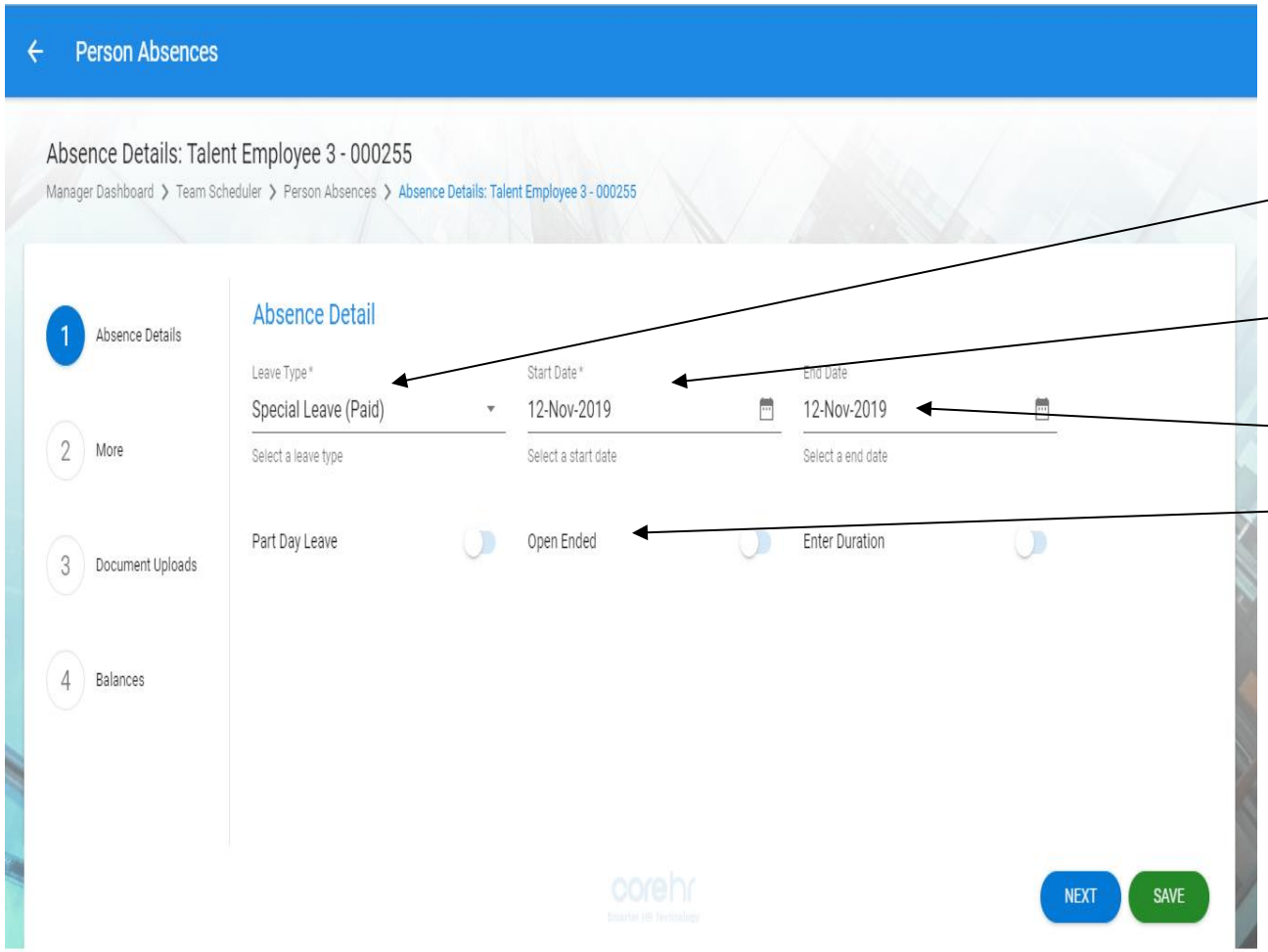
Click on the **Person Absences Option** to bring up the form to add Leave for a member of your team.

Completing the Leave Record



Please select the **Add Absence Button** to input the Leave Request.

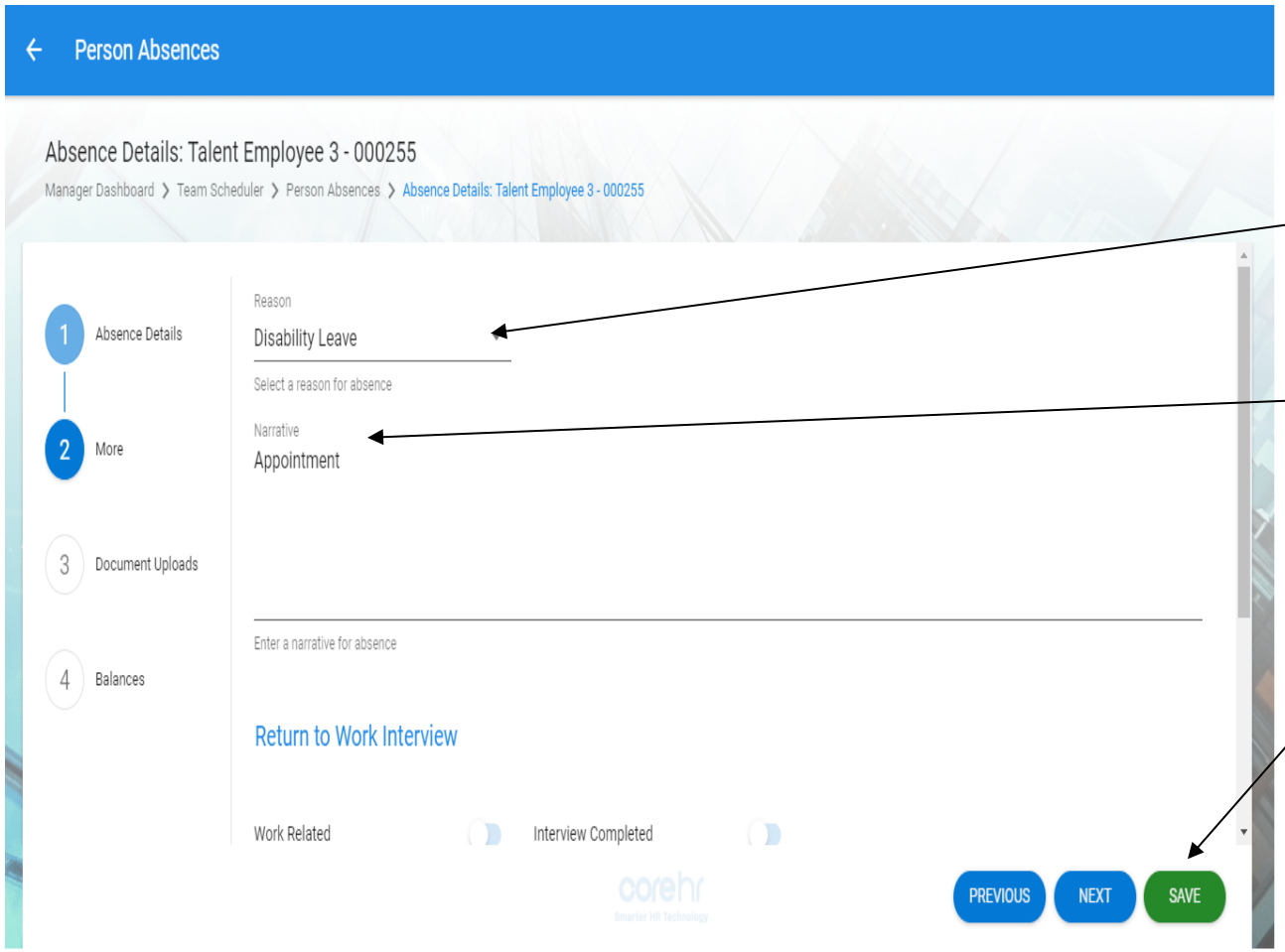
Completing the Leave Record



You will need to select the following details:

- **Leave Type** – Select Annual Leave, Special Leave (Paid), Special Leave (Unpaid) or Unauthorised Leave from the drop-down arrow.
- **Start Date** – Select the start date of the period of Leave.
- **End Date** – Select the end date of the period of Leave.
- **Open Ended** – Select this option if the period of Leave does not have an end date. **Please note – You will need to deselect this option and add in an end date once this is known.**
- You will then need to select **Next** to enter a narrative for the reason for the Leave Request.

Completing the Leave Record



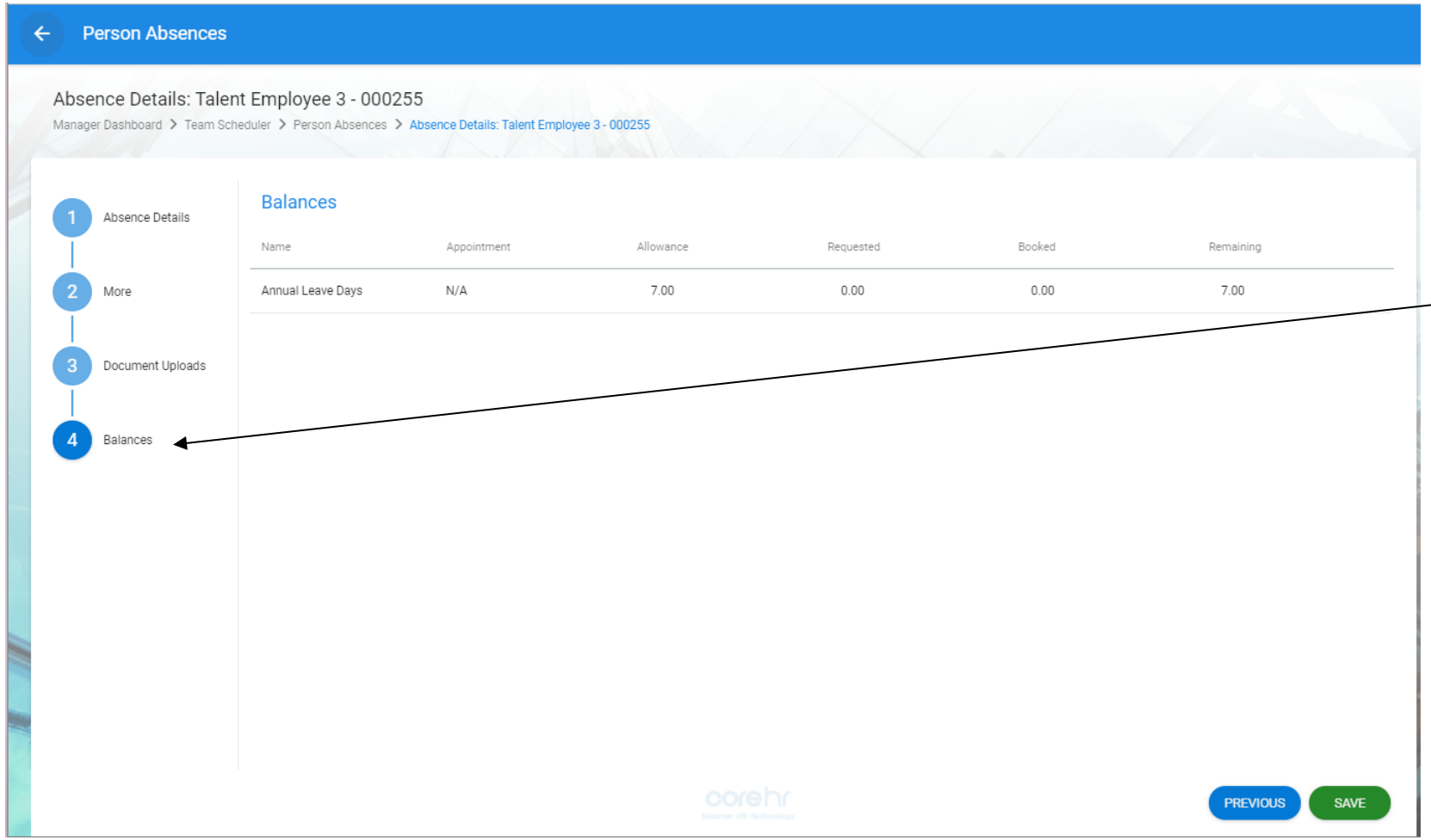
You will need to select the following details on the **More Screen**:

- **Reason** – Select the Leave option from the drop-down arrow (not required for Annual Leave).
- **Narrative** – Enter comments or information about the reason for the leave request.

After these details have been entered, please select the **Save Button** at the bottom of the screen.

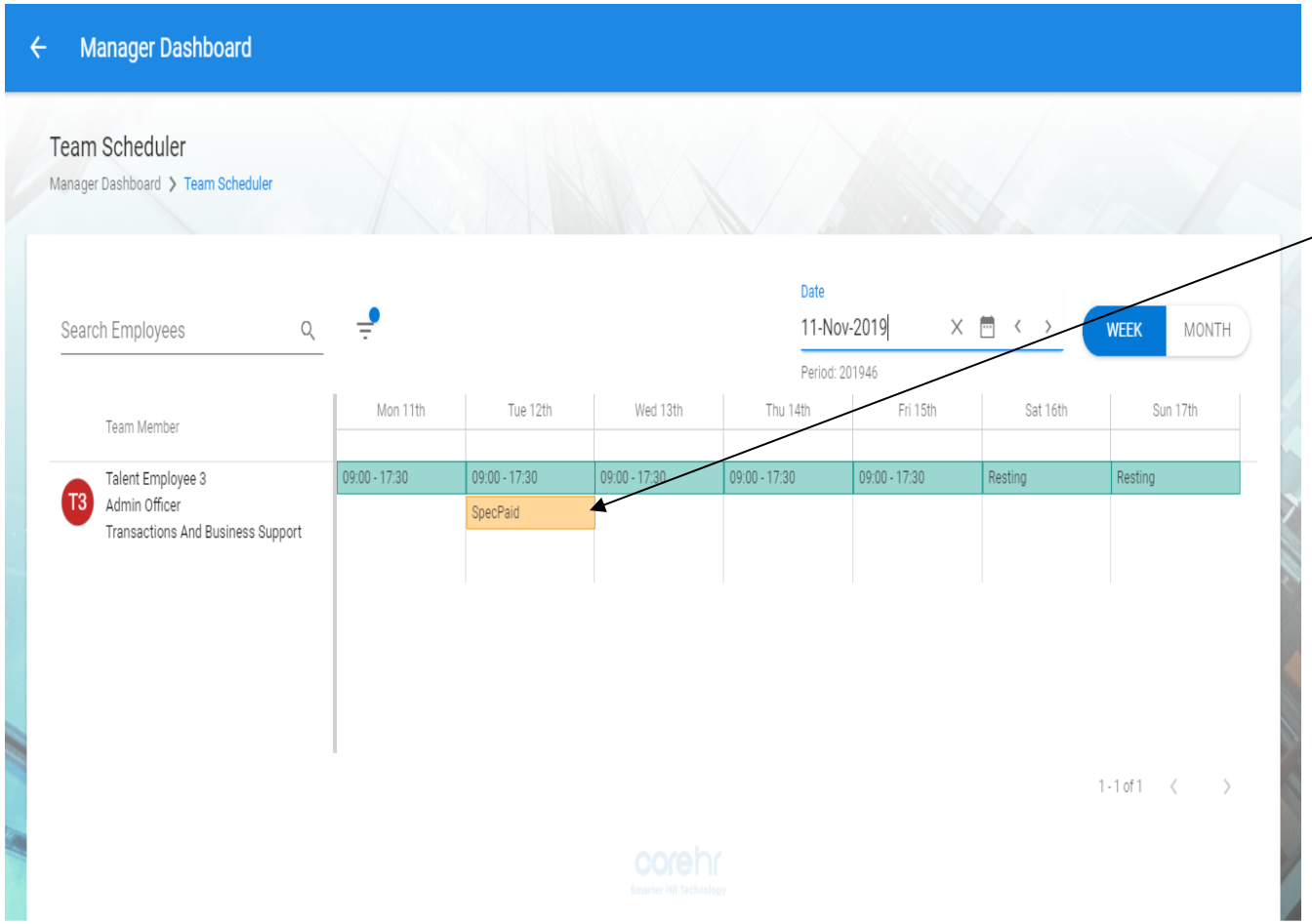
You will need to select the Arrow at the top left-hand corner of the screen to return to the team calendar.

Checking the Leave Balance



If you wish to check the employee's leave balance before saving the leave record (for annual leave), you can do so on the Balances screen.

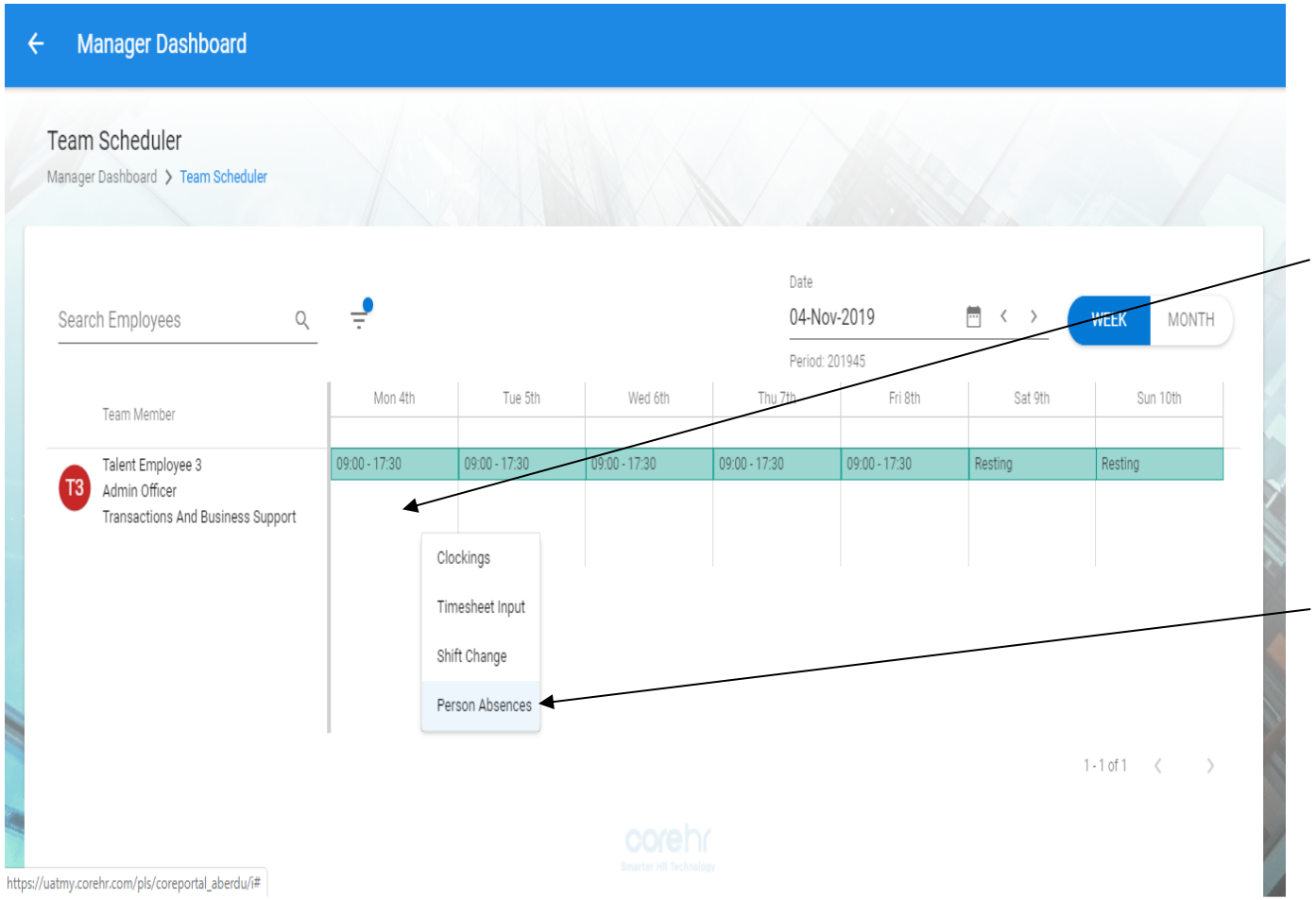
Viewing the Updated Team Calendar



You will be able to see the Leave Record against the relevant employee in the calendar.

You will need to select the Arrow at the top left-hand corner of the screen to go back.

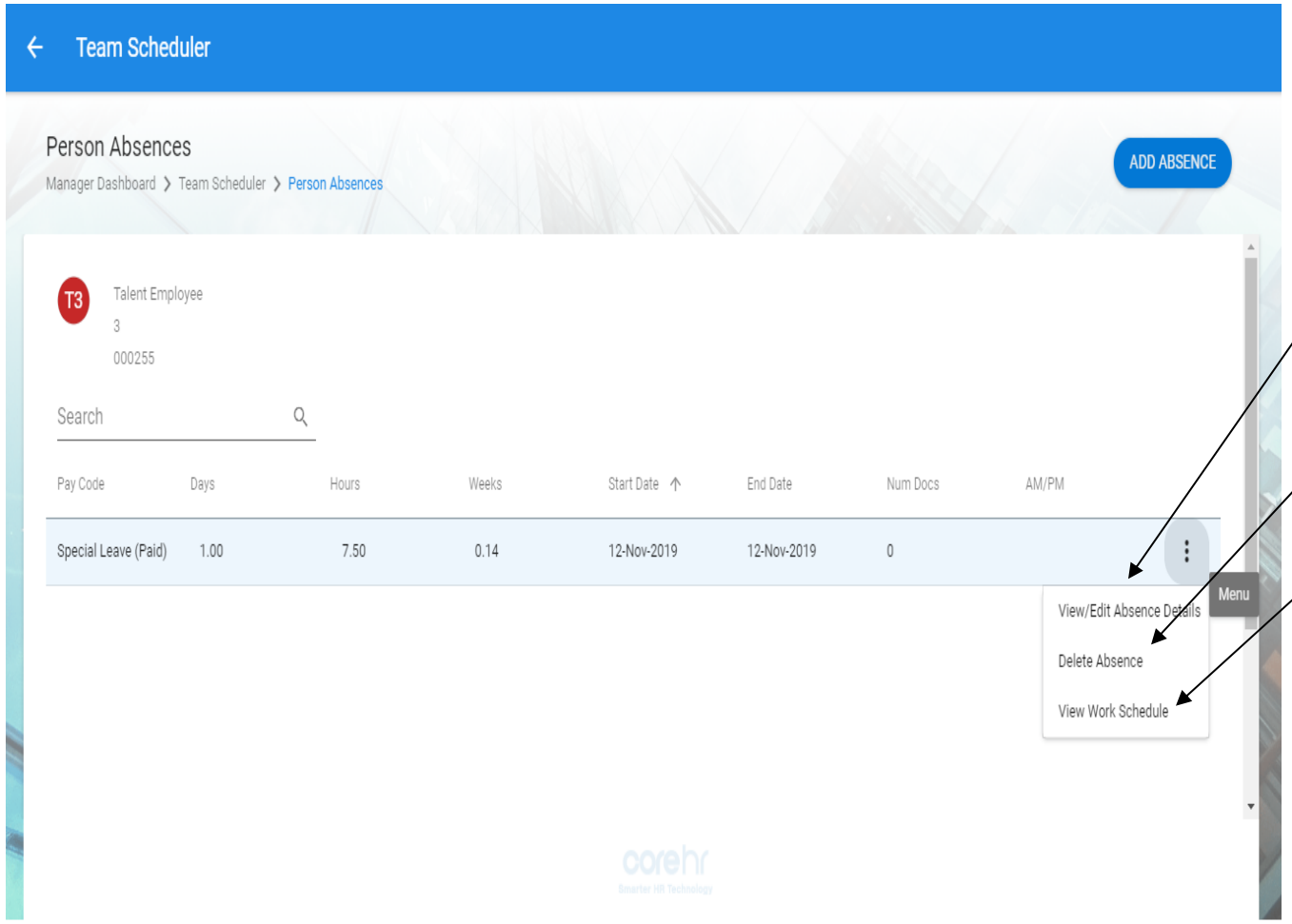
Deleting a Leave Record



Once you are in the Scheduler Form, click on a space under the relevant date you want to add the leave to for that employee. Please note – this is on the white space, not on the marked green area.

Click on the **Person Absences Option** to bring up the form to view all Leave Records for a member of your team.

Deleting a Leave Record



You can select the following options:

- **View/Edit Absence Details** – View the absence details and add in any updates.
- **Delete Absence** – Click to delete the absence.
- **View Work Schedule** – View the work schedule for an employee.

You will need to select the Arrow at the top left-hand corner of the screen to return to the team calendar.