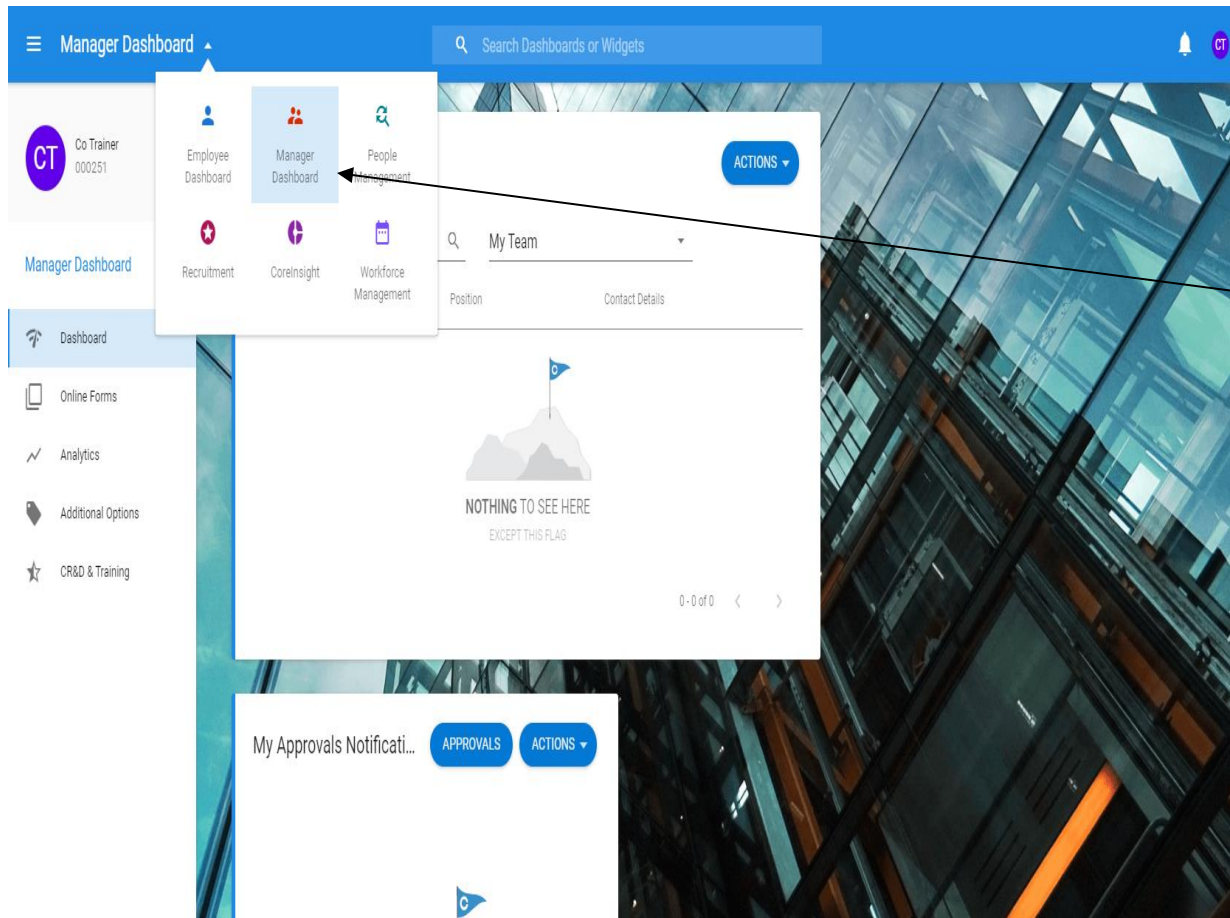


CoreHR Guide

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 as 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

The screenshot displays the 'Manager Dashboard' interface. On the left sidebar, the 'Dashboard' tab is selected. The main content area is titled 'My Team' and features a table of team members. The table has columns for 'Name, Department, Job Title' and 'Contact Details'. The first three rows show team members with IDs 000274, 000278, and 000255. A 'Red Bell' icon is visible in the top right corner of the dashboard, indicating notifications. Below the table, there is a section for 'My Approvals Notifications' with a 'NOTHING TO SEE HERE' message.

Name, Department, Job Title	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

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

The screenshot shows the 'Manager Dashboard' with a 'My Approvals' section. On the left, there is a list of approvals with columns for 'Actions' (marked with a red '6'), 'Updates', and a search bar. The list includes entries for Kelly Sullivan from December 2018 and March 2019. The selected entry is for 'Talent Manager 2' (ID 000260) on 15 Nov, with a red 'T2' icon. The main area displays details for an 'Annual Leave' request: 'Need a Break NOW!!!! NO MORE SHIFT TYPES & WORK PATTERNS', Appointment Id 669-1, Leave Type Annual Leave, Duration 30 Day(s), Date From Monday, 18 Nov 2019, Date To Friday, 3 Jan 2020, and Reason Holiday. Below this, there is a link to review terms and conditions, a confirmation checkbox, and 'REJECT' and 'APPROVE' buttons at the bottom right. The CoreHR logo is visible in the bottom left.

Manager Dashboard

My Approvals
Manager Dashboard > My Approvals

VIEW DETAILS

Actions ⁶ Updates

Search

KS Kelly Sullivan 12 Dec 2018

KS Kelly Sullivan Missed Clocking 12 Dec 2018

KS Kelly Sullivan 17 Dec 2018

KS Kelly Sullivan 17 Dec 2018

KS Kelly Sullivan 13 Mar

T2 Talent Manager 2 000260 15 Nov

Annual Leave

15 Nov 2019 14:25

Comments
Need a Break NOW!!!! NO MORE SHIFT TYPES & WORK PATTERNS

Appointment Id	Leave Type	Duration	Date From	Date To
669-1	Annual Leave	30 Day(s)	Monday, 18 Nov 2019	Friday, 3 Jan 2020

Reason
Holiday

To read and review the terms and conditions for approval, please click [here](#)

☐ I confirm that the above details are correct

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REJECT APPROVE

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

← My Approvals

Balances

Manager Dashboard > My Approvals > Balances

Annual Leave Hours

214.36 hours

[VIEW](#)

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

Balance Type*

Annual Leave Hours

Entitlement 244.12 hours

Carried 0 hours

Taken 29.36 hours

Booked 0 hours

Balance 214.36 hours

Floating

Balance Type	Date	hours	
Opening Values	01st January 2019	251.36	
Service Qualified 04-NOV-2008	01st January 2019	37	VIEW NARRATIVE
Service Qualified 04-NOV-2013	01st January 2019	22.12	VIEW NARRATIVE

Reserved

Balance Type	Date	hours	
Opening Values	01st January 2019	0	
01-Jan-2019 Public Holiday	01st January 2019	-7.24	VIEW NARRATIVE

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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

The screenshot displays the 'Manager Dashboard' interface. On the left, a sidebar contains navigation links: 'Manager Dashboard', 'Dashboard' (highlighted), 'Online Forms', 'Analytics', 'Additional Options', and 'CR&D & Training'. The main content area is titled 'My Team' and features a search bar with the text 'My Team'. Below the search bar is a table with columns: 'Employee', 'Position', and 'Contact Details'. The table contains one entry for 'Talent Employee 3' (ID 000255) with the position 'Transactions And Business Sup...' and 'Admin Officer'. To the right of the table is an 'ACTIONS' dropdown menu with options 'View Scheduler' and 'Transfers'. At the bottom of the page, there is a 'My Approvals Notificati...' section with 'APPROVALS' and 'ACTIONS' buttons. The 'corehr' logo is visible in the bottom left corner.

Employee	Position	Contact Details
Talent Employee 3 000255	Transactions And Business Sup... Admin Officer	None Set None Set

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

The screenshot displays the 'Team Scheduler' interface. At the top, there's a blue header with a back arrow and 'Manager Dashboard'. Below it, the 'Team Scheduler' title is shown with a breadcrumb 'Manager Dashboard > Team Scheduler'. A search bar labeled 'Search Employees' is on the left. The main area shows a calendar for the week of 04-Nov-2019. The date selector at the top right shows '04-Nov-2019' with 'WEEK' and 'MONTH' tabs. The calendar grid has columns for Mon 4th, Tue 5th, Wed 6th, Thu 7th, Fri 8th, Sat 9th, and Sun 10th. A team member 'Talent Employee 3' (Admin Officer, Transactions And Business Support) is listed on the left. Their schedule shows shifts from 09:00 - 17:30 on Mon-Fri and 'Resting' on Sat-Sun. A dropdown menu is open for 'Person Absences' with options: Clockings, Timesheet Input, Shift Change, and Person Absences. The CoreHR logo is at the bottom center.

Team Member	Mon 4th	Tue 5th	Wed 6th	Thu 7th	Fri 8th	Sat 9th	Sun 10th
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

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

Team Scheduler

Person Absences

Manager Dashboard > Team Scheduler > Person Absences

ADD ABSENCE

T3 Talent Employee
3
000255

Search

Pay Code	Days	Hours	Weeks	Start Date	End Date	Num Docs	AM/PM
----------	------	-------	-------	------------	----------	----------	-------

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

Completing the Leave Record

← Person Absences

Absence Details: Talent Employee 3 - 000255

Manager Dashboard > Team Scheduler > Person Absences > Absence Details: Talent Employee 3 - 000255

1 Absence Details

Absence Detail

Leave Type *
Special Leave (Paid)
Select a leave type

Start Date *
12-Nov-2019
Select a start date

End Date
12-Nov-2019
Select an end date

Part Day Leave

Open Ended

Enter Duration

2 More

3 Document Uploads

4 Balances

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NEXT SAVE

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

← Person Absences

Absence Details: Talent Employee 3 - 000255

Manager Dashboard > Team Scheduler > Person Absences > Absence Details: Talent Employee 3 - 000255

1 Absence Details

2 More

3 Document Uploads

4 Balances

Reason

Disability Leave

Select a reason for absence

Narrative

Appointment

Enter a narrative for absence

[Return to Work Interview](#)

Work Related ☐ Interview Completed ☐

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PREVIOUS NEXT SAVE

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

Person Absences

Absence Details: Talent Employee 3 - 000255

Manager Dashboard > Team Scheduler > Person Absences > Absence Details: Talent Employee 3 - 000255

1 Absence Details

2 More

3 Document Uploads

4 Balances

Balances

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave Days	N/A	7.00	0.00	0.00	7.00

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PREVIOUS SAVE

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

The screenshot displays the 'Manager Dashboard' with a 'Team Scheduler' section. A search bar for employees is at the top left. The calendar view is for the week of November 11-17, 2019, with a date picker set to 11-Nov-2019 and a 'WEEK' view selected. The calendar grid shows time slots from 09:00 to 17:30. Talent Employee 3, an Admin Officer, has a 'SpecPaid' leave record on Tuesday, Nov 12th, highlighted in orange. The interface includes a 'corehr' logo at the bottom.

Team Member	Mon 11th	Tue 12th	Wed 13th	Thu 14th	Fri 15th	Sat 16th	Sun 17th
Talent Employee 3 Admin Officer Transactions And Business Support	09:00 - 17:30	09:00 - 17:30 SpecPaid	09:00 - 17:30	09:00 - 17:30	09:00 - 17:30	Resting	Resting

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

← Manager Dashboard

Team Scheduler
Manager Dashboard > Team Scheduler

Search Employees

Date: 04-Nov-2019
Period: 201945
WEEK MONTH

Team Member	Mon 4th	Tue 5th	Wed 6th	Thu 7th	Fri 8th	Sat 9th	Sun 10th
T3 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

- Clockings
- Timesheet Input
- Shift Change
- Person Absences**

1 - 1 of 1

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https://uatmy.corehr.com/pls/coreportal_aberdu/#

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

Team Scheduler

Person Absences

Manager Dashboard > Team Scheduler > Person Absences

ADD ABSENCE

Talent Employee
3
000255

Search

Pay Code	Days	Hours	Weeks	Start Date	End Date	Num Docs	AM/PM
Special Leave (Paid)	1.00	7.50	0.14	12-Nov-2019	12-Nov-2019	0	

View/Edit Absence Details
Delete Absence
View Work Schedule

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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.