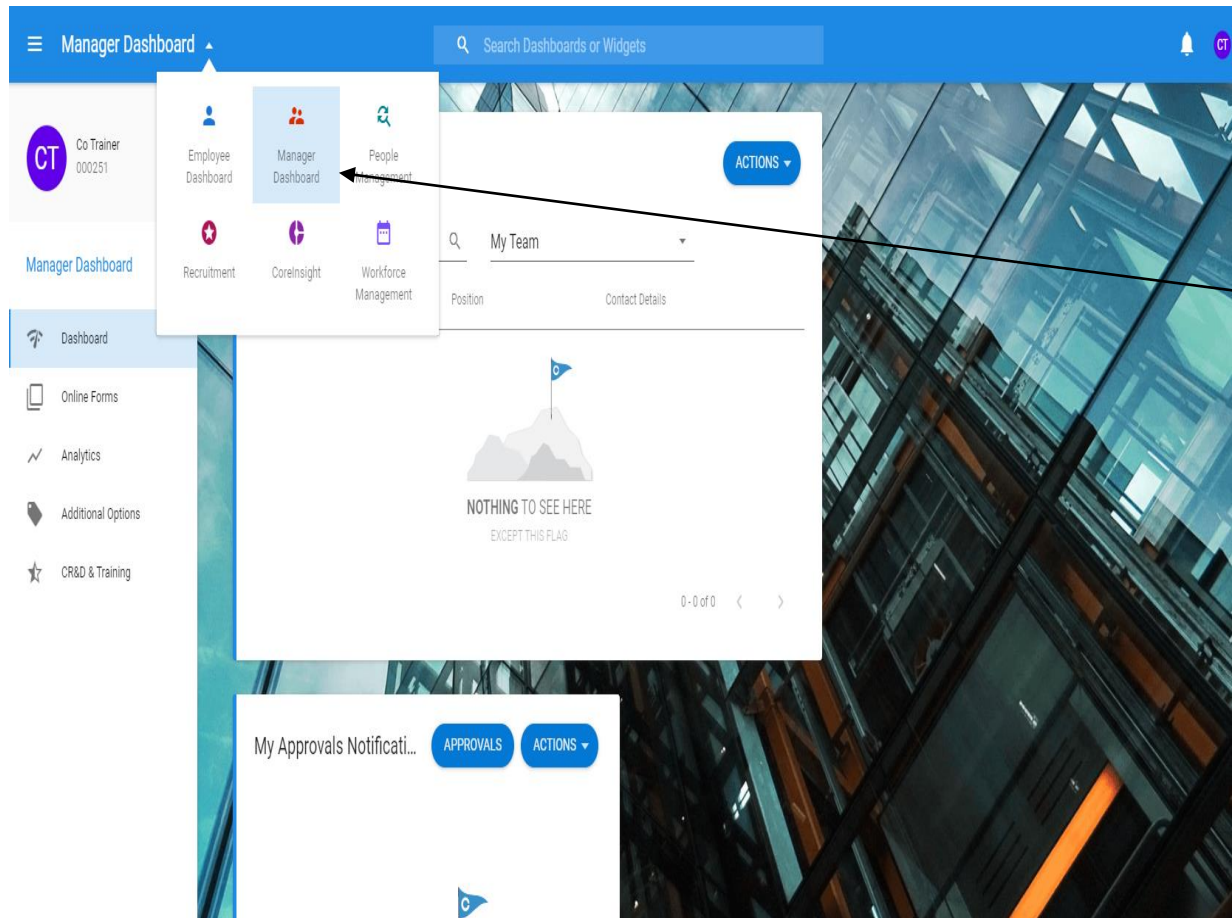


CoreHR Guide

Logging & Approving Your Team's Records During Covid-19

This guide will explain how to log, approve or reject records 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

The screenshot displays the 'Manager Dashboard' interface. On the left, a sidebar contains navigation options: 'Manager Dashboard' (selected), '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 search bar and a table of team members. The bottom section, titled 'My Approvals Notificati...', includes tabs for 'APPROVALS' and 'ACTIONS', and a placeholder graphic with the text 'NOTHING TO SEE HERE EXCEPT THIS FLAG'. A 'Red Bell' icon with a notification count of 6 is visible in the top right corner of the dashboard header.

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

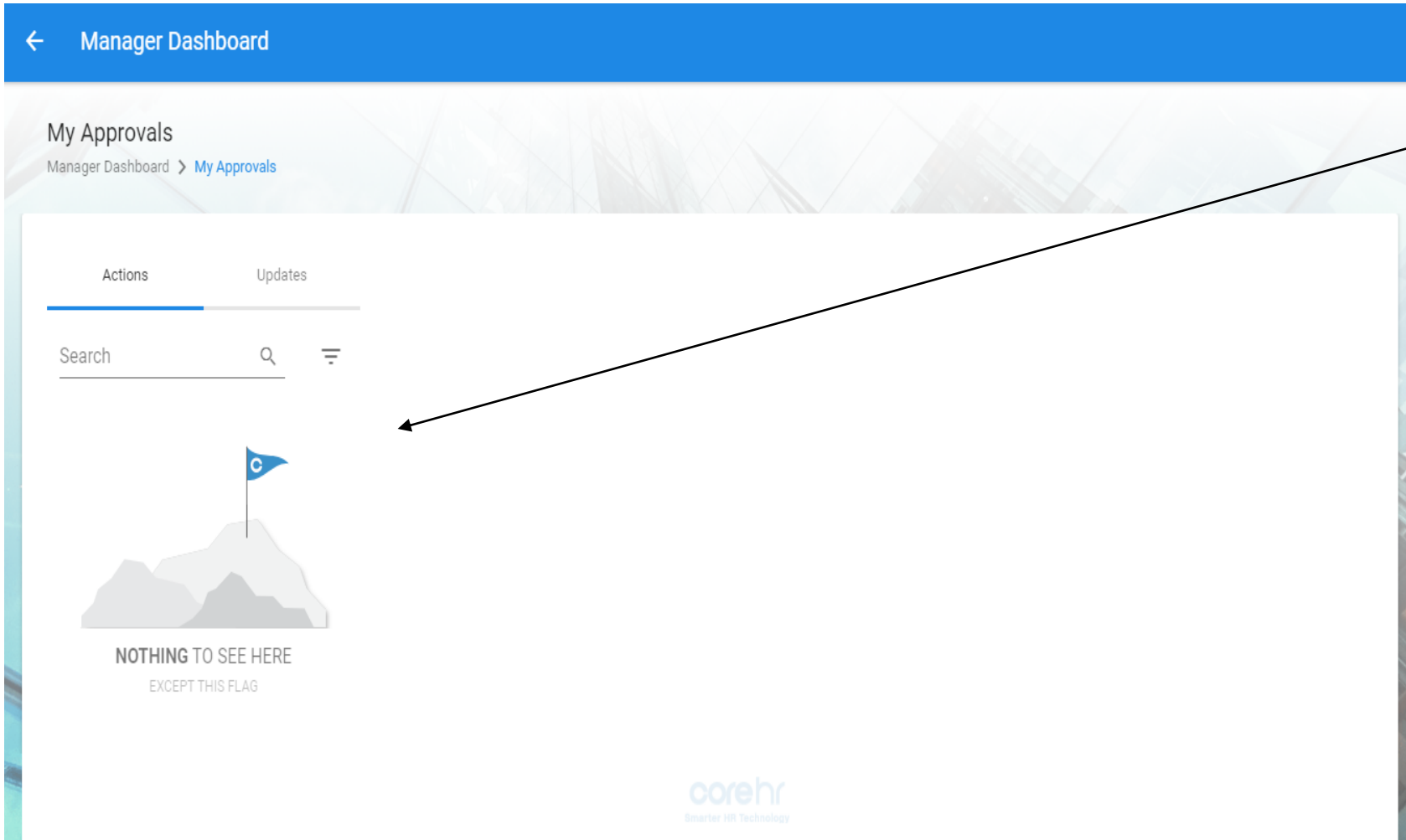
Make sure you are on the Dashboard Tab on the left hand side.

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 Requests



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

All records will appear on this screen where you can approve / reject / etc. Click this box to approve / reject the record.

Click on the Arrow on the top left-hand corner of the screen to return to the previous screen.

Recording Leave or Working from Home on behalf of Employees

Recording on Behalf of 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 row 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 calendar by clicking on the Drop-Down Arrow beside the **Action Button** and selecting the **View Scheduler** option.

Scheduler Screen

← 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

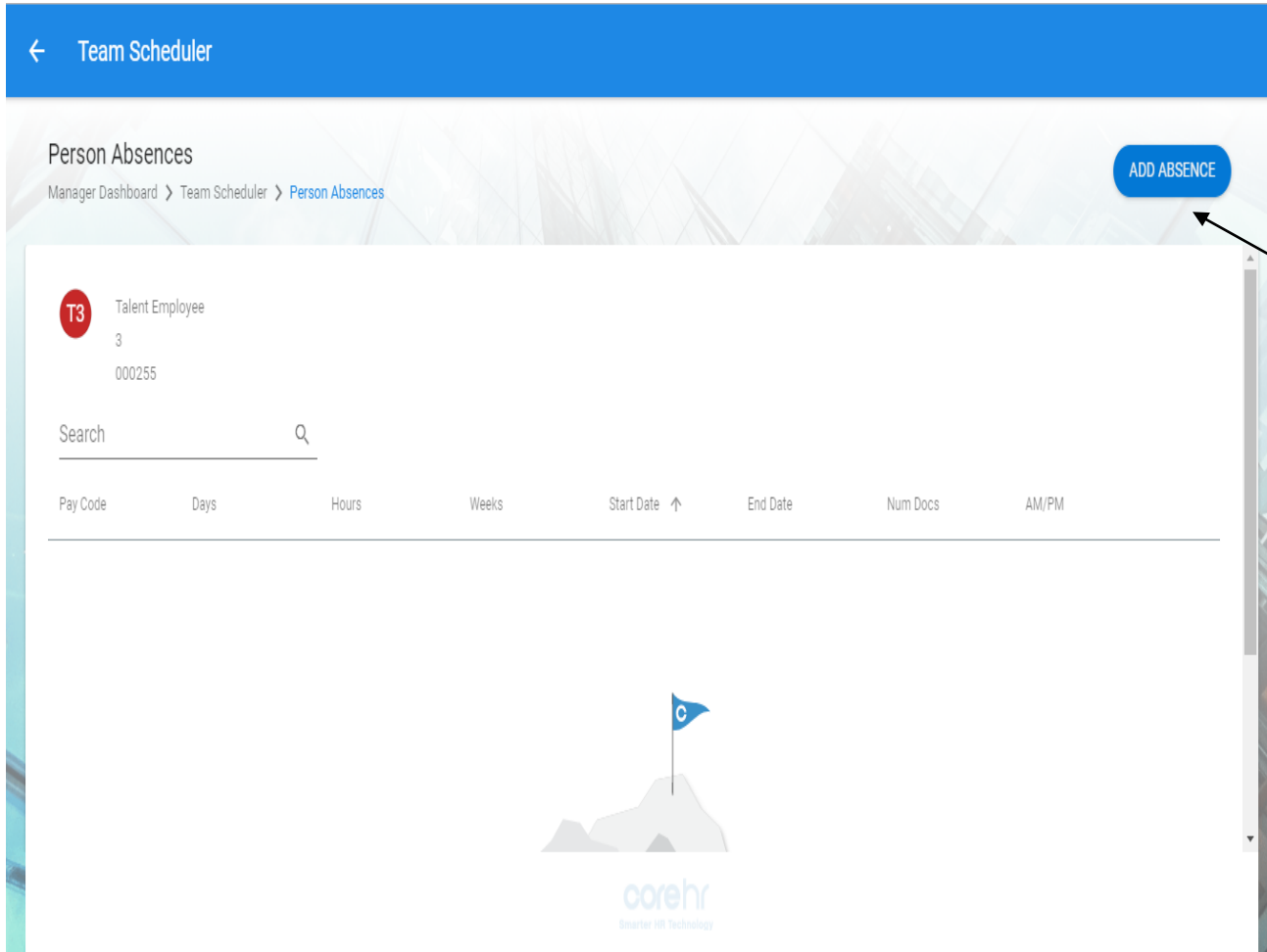
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https://uatmy.corehr.com/pls/coreportal_aberdu/#

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 add Special Leave for a member of your team.

Recording Leave/Working from Home for your Employee



Please select the
Add Absence
Button to input the
Record.

Recording Leave/Working from Home for your Employee

You will need to select the following details:

- **Leave Type** – Please select the appropriate type **Please see table for recording**
- **Start Date** – The first date of the record.
- **Open Ended** – Select this option. **Please note – You will need to deselect this option and add in an end date when employee is able to return to work or circumstances change.**
- You will then need to select **Next** to enter a narrative for the reason for the record.

Recording Leave/Working from Home for your Employee

← 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** – Please select the appropriate type
Please see table for recording
- **Narrative** – A comments box where you can add in further details if needed.

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.

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. The selected employee, 'Talent Employee 3', is shown with a schedule of 09:00-17:30 from Monday to Friday, and 'Resting' on Saturday and Sunday. An orange 'SpecPaid' block is visible on Tuesday, November 12th, at 09:00-17:30. An arrow points from the text 'You will be able to see the record against the relevant employee in the calendar.' to this 'SpecPaid' block. Another arrow points from the text 'You will need to select the Arrow at the top left-hand corner of the screen.' to a small arrow icon in the top left corner of the calendar area. The 'corehr' logo is at the bottom center.

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 record against the relevant employee in the calendar.

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

Deleting a Record

The screenshot shows 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 04-Nov-2019. The employee 'Talent Employee 3' is selected, showing their schedule. A context menu is open over the 4th of November, with 'Person Absences' highlighted. An arrow points from the text on the right to the 'Person Absences' option in the menu.

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

Context Menu Options:

- Clockings
- Timesheet Input
- Shift Change
- Person Absences

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 Records for a member of your team.

Deleting a 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
Special Leave (Paid)	1.00	7.50	0.14	12-Nov-2019	12-Nov-2019	0	

Menu

- 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.