Trinity College Dublin
Coláiste na Tríonóide, Baile Átha Cliath
The University of Dublin

CorePortal Leave Module

User Guide for Employees

Contents

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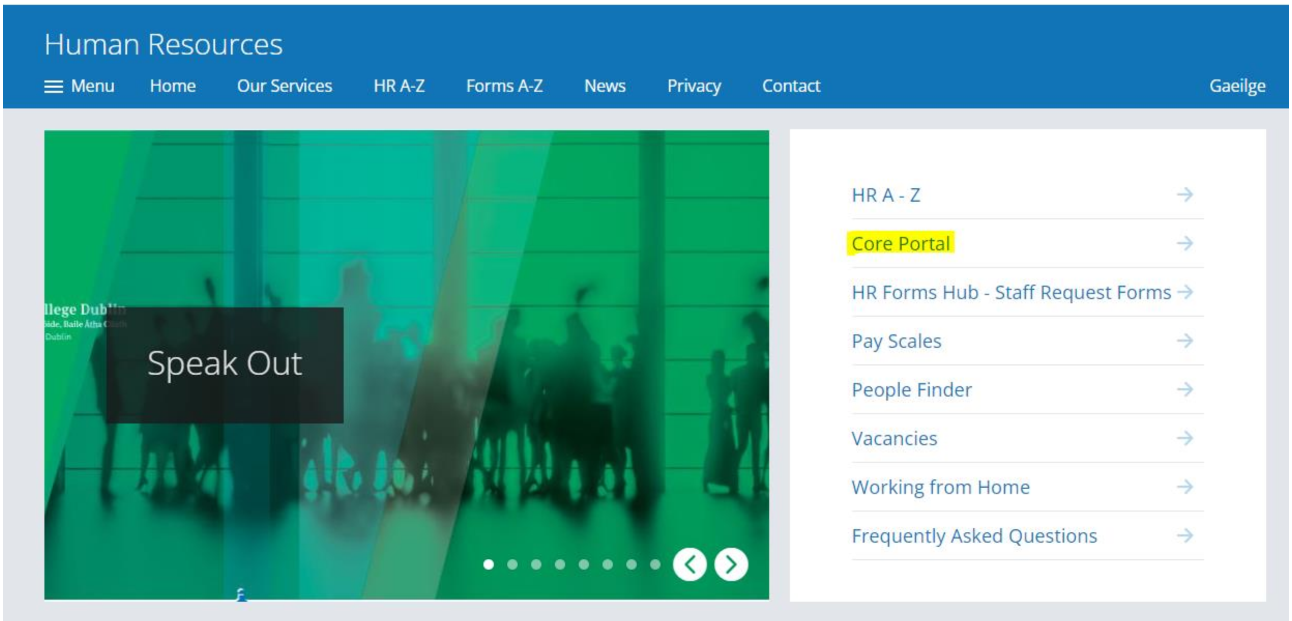
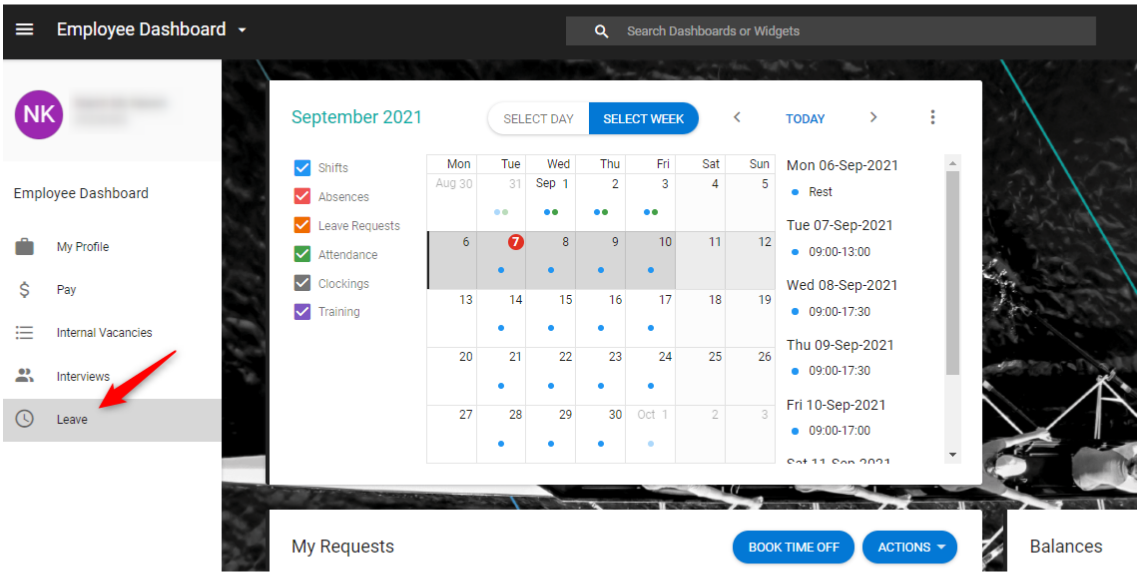
Overview

The purpose of this document is to provide an overview of the functionality in the *Electronic Recording of Leave* (ELeave) module in Core Portal. A link to Core Portal can be found on the HR webpage at [tcd.ie/hr](tcd.ie/hr):



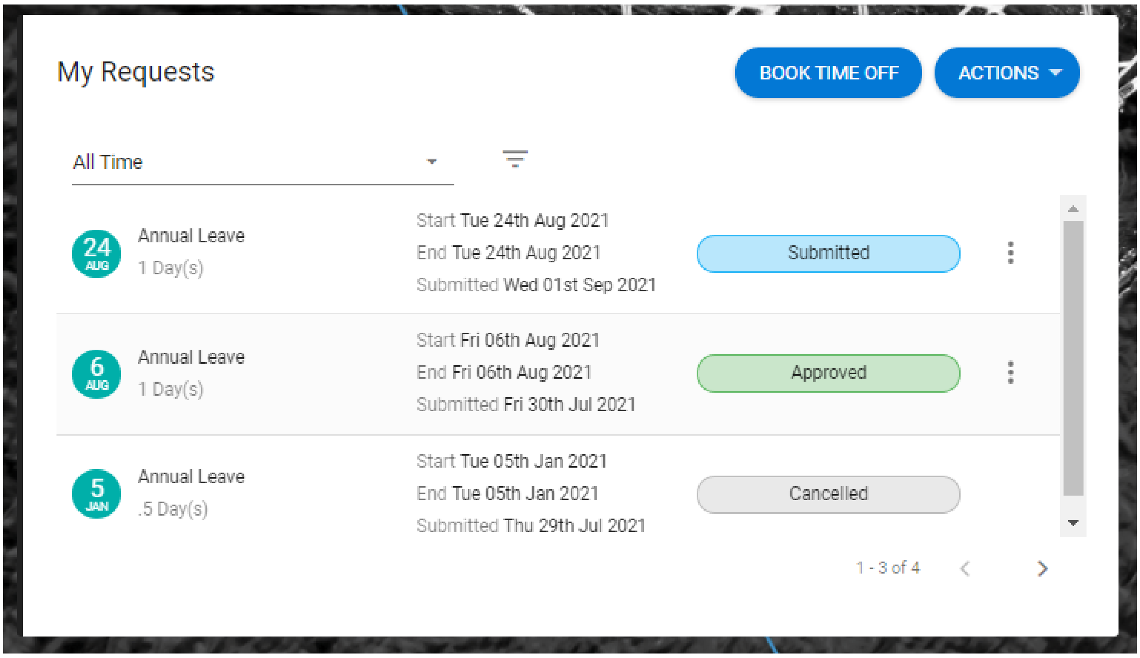
Tip: Direct link to CorePortal can also be added to your browser's bookmarks to allow you quick access whenever you need it.

ELeave allows employees to manage their own *Leave Requests* through the Employee Dashboard.

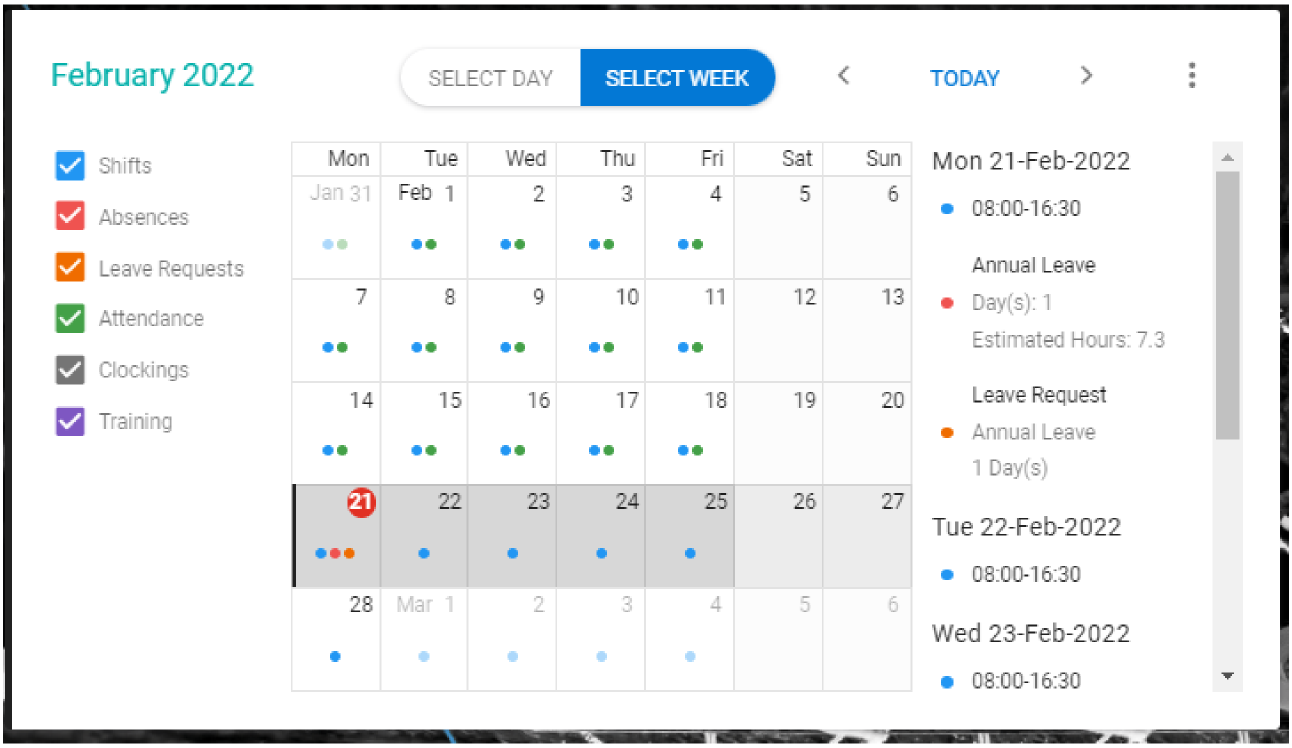


It also allows employees to submit *Leave Requests* to their managers for approval and then view and edit an already submitted request, if required.

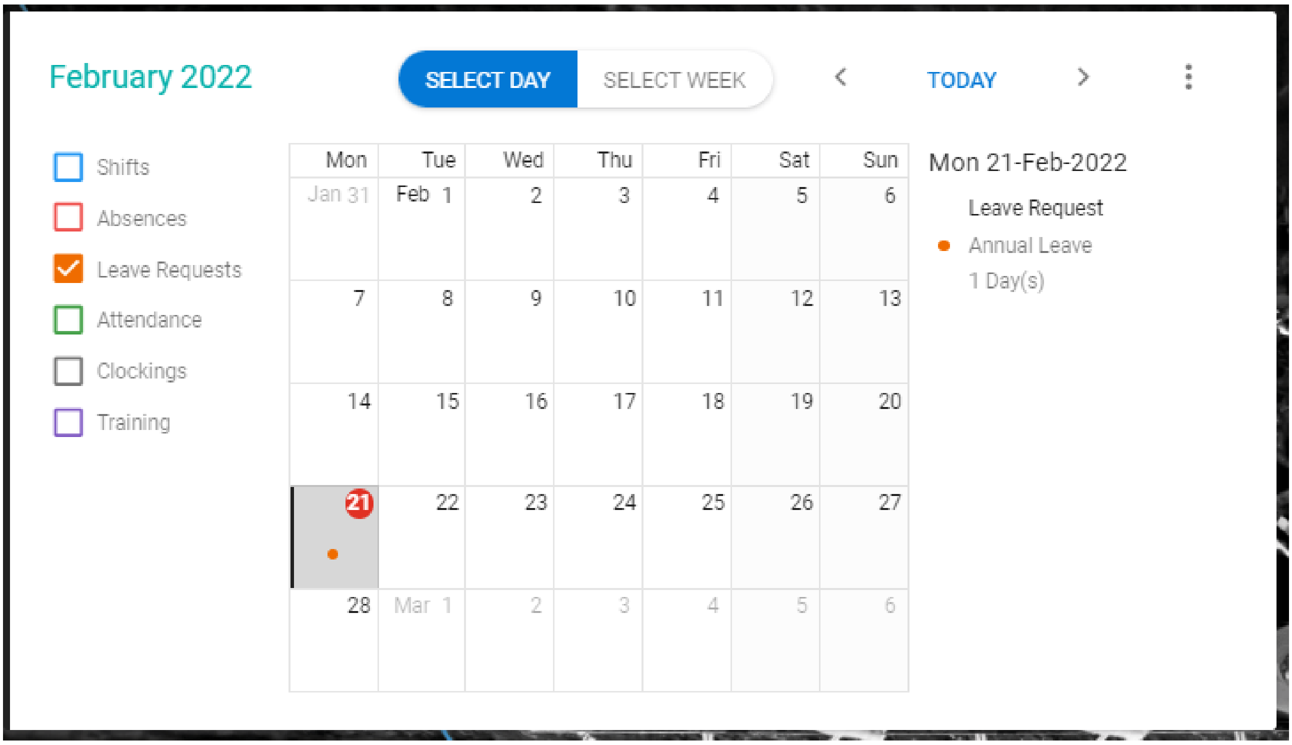
From their *Employee Dashboard,* employees can review the status of their requests, and make amendments as required, via the *My Requests* widget. The *My Requests* widget is shown in the below screenshot.



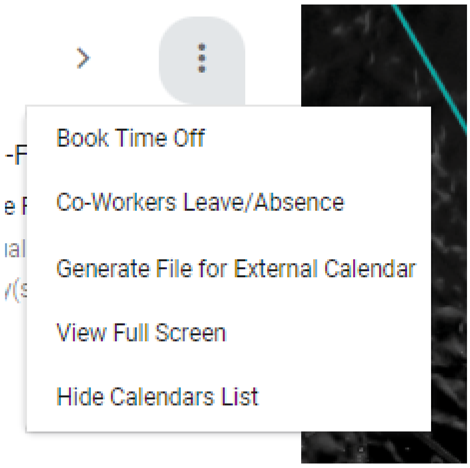
The calendar is an aid that allows you easily track your work pattern, leave requests and other details.



You can easily select the details you want to see, to make the view clearer, by selecting items you are interested in and by narrowing down weekly view to a particular day:



Additional options available under Calendar:



a) **Book Time Off** – a shortcut to the screen allowing to request leave (same as the Book Time Off button under My Requests).

b) **Co-Workers Leave/Absences** – access to Team Calendar allowing you to see leave planned or taken by your teammates (members of the same team/work group on the system).

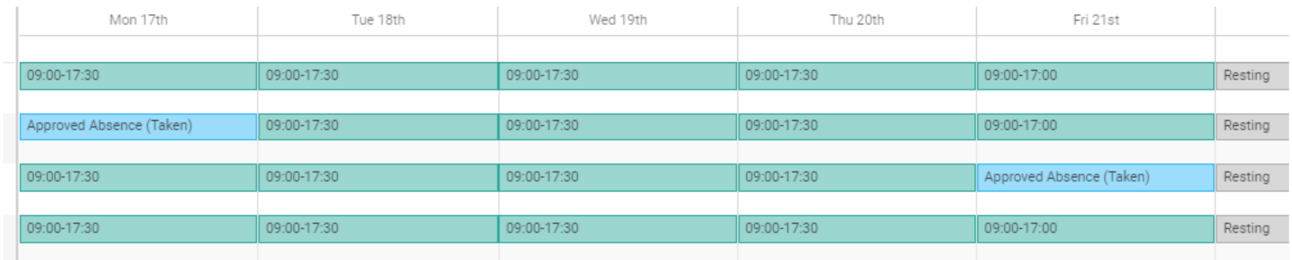
c) **Generate File for External Calendar** – allows to generate an .ics file that can be added to your personal calendar (i.e. Outlook) with your leave requests.

d) **View Full Screen** – expands the calendar view to a full screen mode

e) **Hide Calendar List** – temporary hides the list of items you can see in the calendar.

Team Calendar

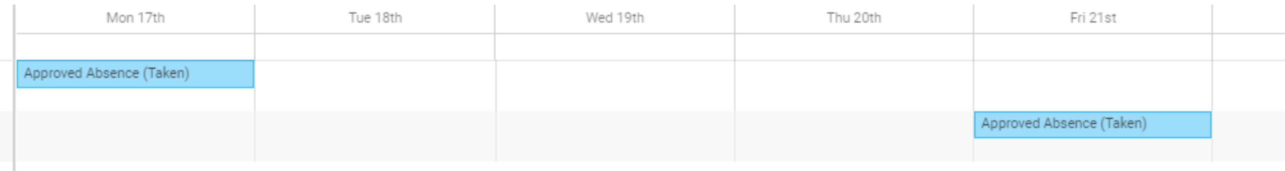
Once you select the Co-Workers Leave, you will be brought to a Team Calendar view where you can see your colleagues work pattern and recorded absences:



Mon 17th	Tue 18th	Wed 19th	Thu 20th	Fri 21st	
09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:00	Resting
Approved Absence (Taken)	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:00	Resting
09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	Approved Absence (Taken)	Resting
09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:30	09:00-17:00	Resting

You can narrow down the view to show only absences by ticking this option:

You will then only see those colleagues that have absences in the week of your interest:

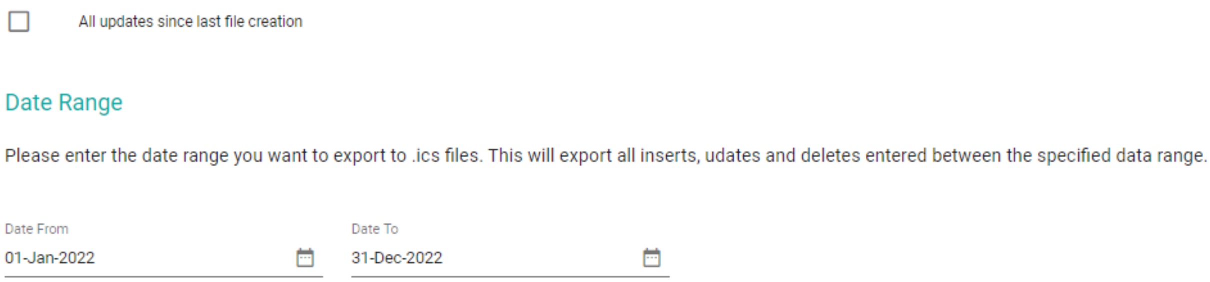


Sharing with external calendar

There is a way to download your leave plans into your personal calendar (e.g. Outlook) without having to populate it manually.

a) Select option *Generate File for External Calendar*.

b) Select date range you wish to generate the file for.



Tip: If you generated this file before, you may be able to pick the option to create file since last file creation

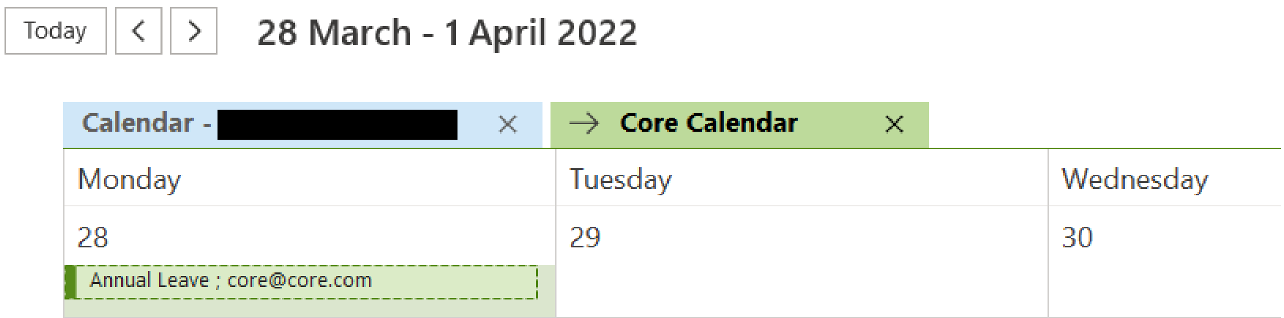
c) Click 

button.

d) A file named *download.ics* will be automatically downloaded by your browser and saved in line with your browser's download settings (e.g. in your devices' default *Downloads* folder).

e) Open the *download.ics* file and it should automatically recognise your default personal calendar.

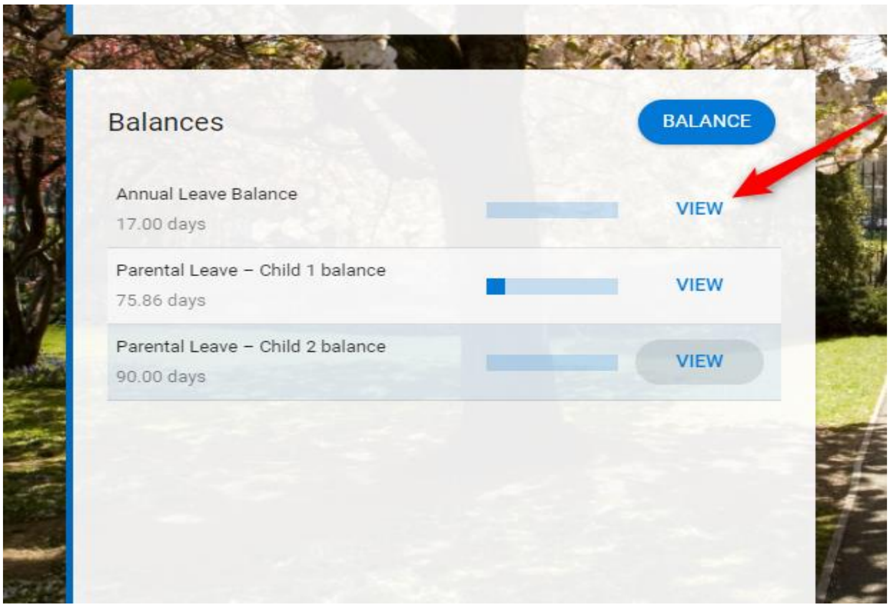
f) Once you confirm upload of the file to the calendar, a new tab should appear in your calendar that will include your scheduled leave plans:



It is possible for employees to view their balance information from the *Balances* widget or through their profile settings.

Balance Widget

a) To view individual balance information click **View button** on the applicable balance.

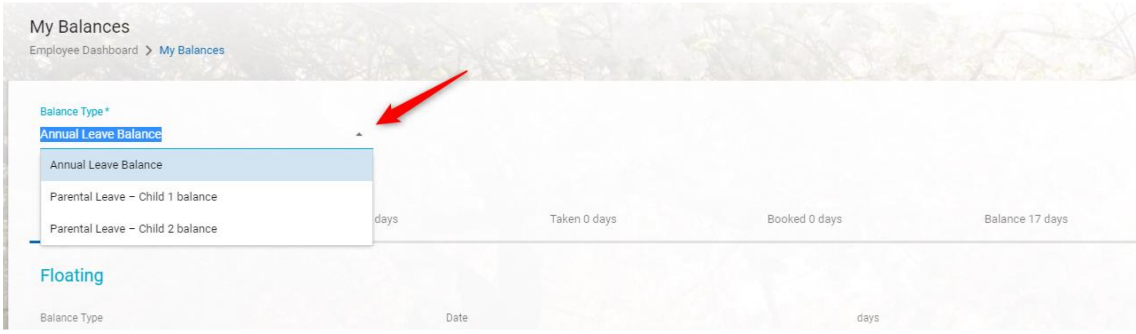


In this example, the 'Annual Leave' *Balance Type* is selected.

The *My Balances* screen displays.

This screen lists information relating to the selected *Balance Type*.

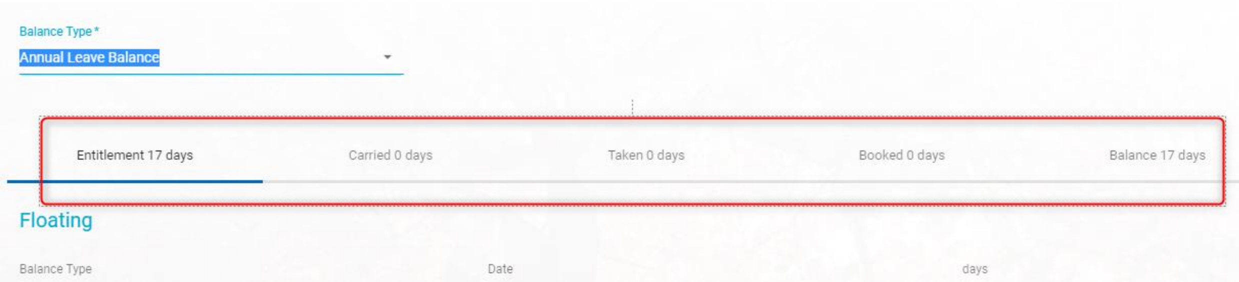
Here it is possible to specify a different *Balance Type*, if required, as highlighted below.



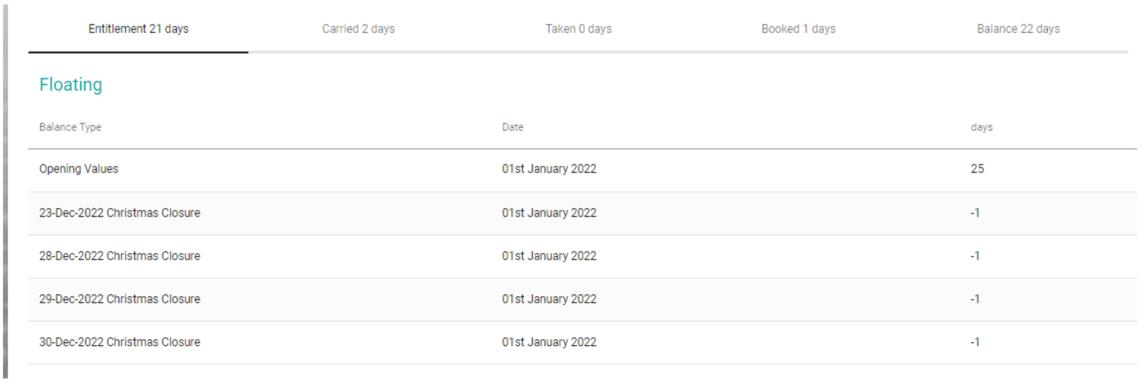
The *My Balances* screen lists the following information for the *Balance Type*.

- **Entitlement** – summary of days allocated for the current balance period, after deducting Christmas Closure days
- **Carried over** – leftover balance from previous leave period that is carried into the new one
- **Taken** – days already taken as leave in this balance period
- **Booked** – days booked and approved to be taken as leave in the future

- **Balance** – summary of days left to be used



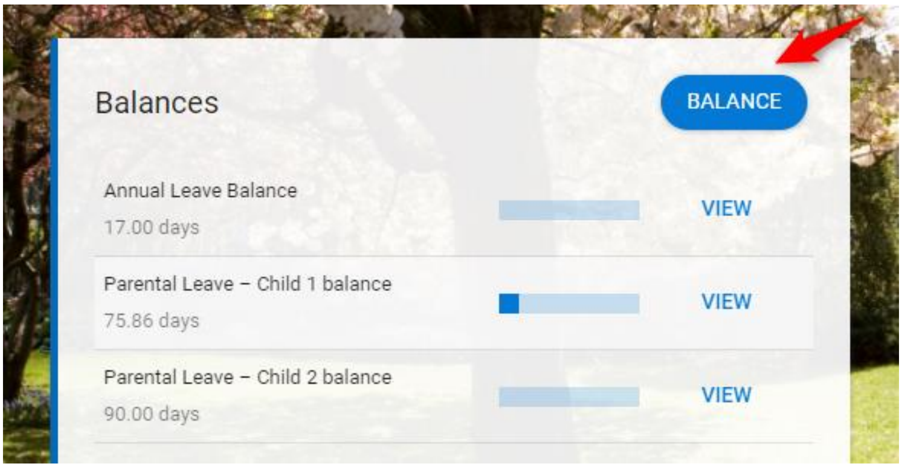
Under each of these tabs are shown details of items contributing to the category:


Entitlement 21 days | Carried 2 days | Taken 0 days | Booked 1 days | Balance 22 days

Floating

Balance Type	Date	days
Opening Values	01st January 2022	25
23-Dec-2022 Christmas Closure	01st January 2022	-1
28-Dec-2022 Christmas Closure	01st January 2022	-1
29-Dec-2022 Christmas Closure	01st January 2022	-1
30-Dec-2022 Christmas Closure	01st January 2022	-1

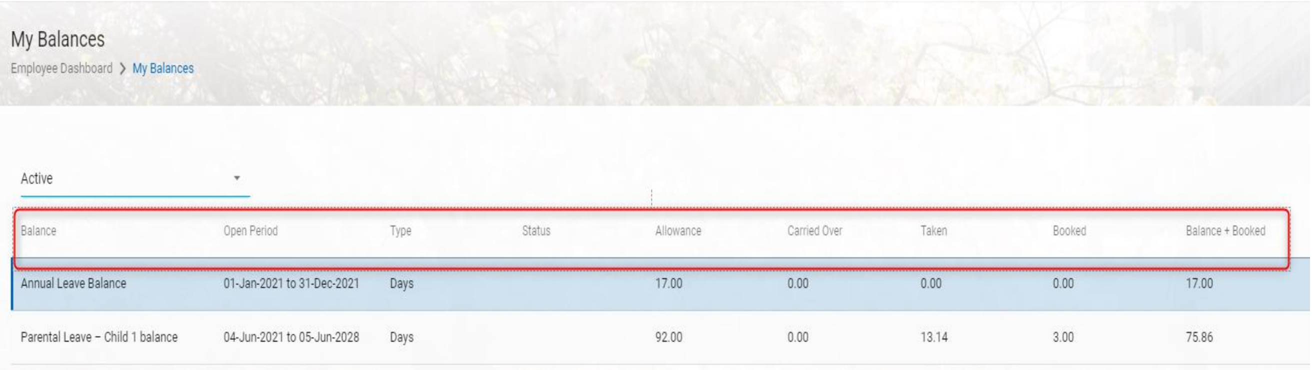
b) To view information on all *Balance Types* click **Balance** button.



The *My Balances* screen displays.

This screen lists information relating to all *Balance Types* assigned to your employee record.

The *My Balances* screen lists each *Balance Type* assigned to your employee record. It also details the following information per *Balance Type*:



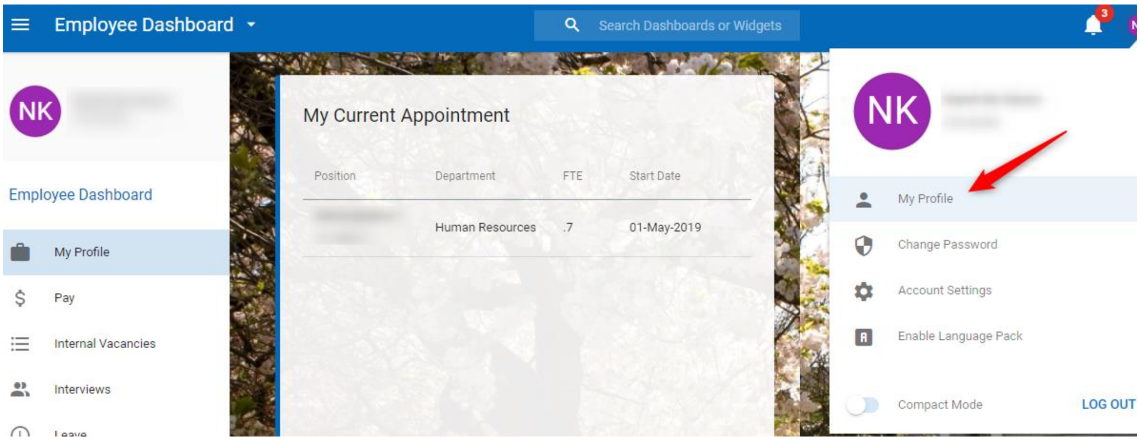
Under *Allowance,* similarly to *Entitlement*, value given is calculated from the base annual leave entitlement for the person with Christmas Closure days already deducted.

My Profile

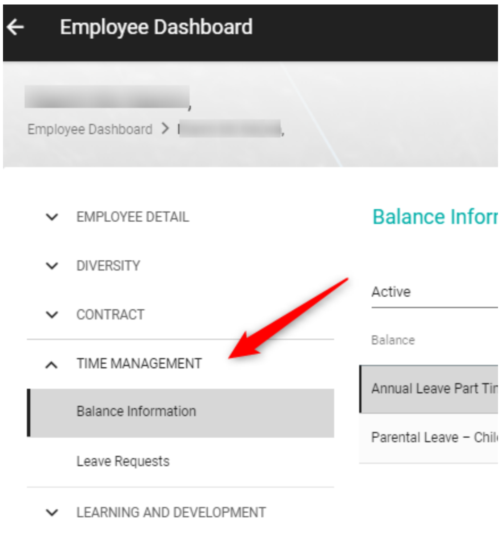
It is also possible to view balance information via the *Balance Information* screen, accessed from *My Profile*.

To access the *Balance Information* screen:

1. Select **My Profile**.



2. Click **Time Management** to expand.

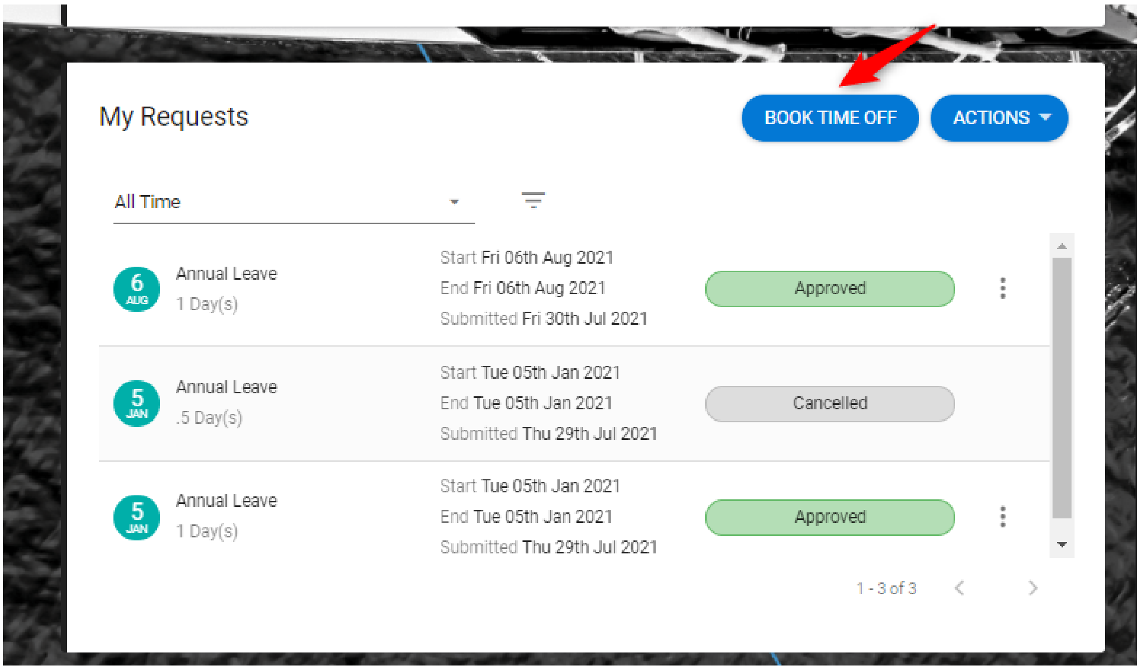


3. Select **Balance Information**.

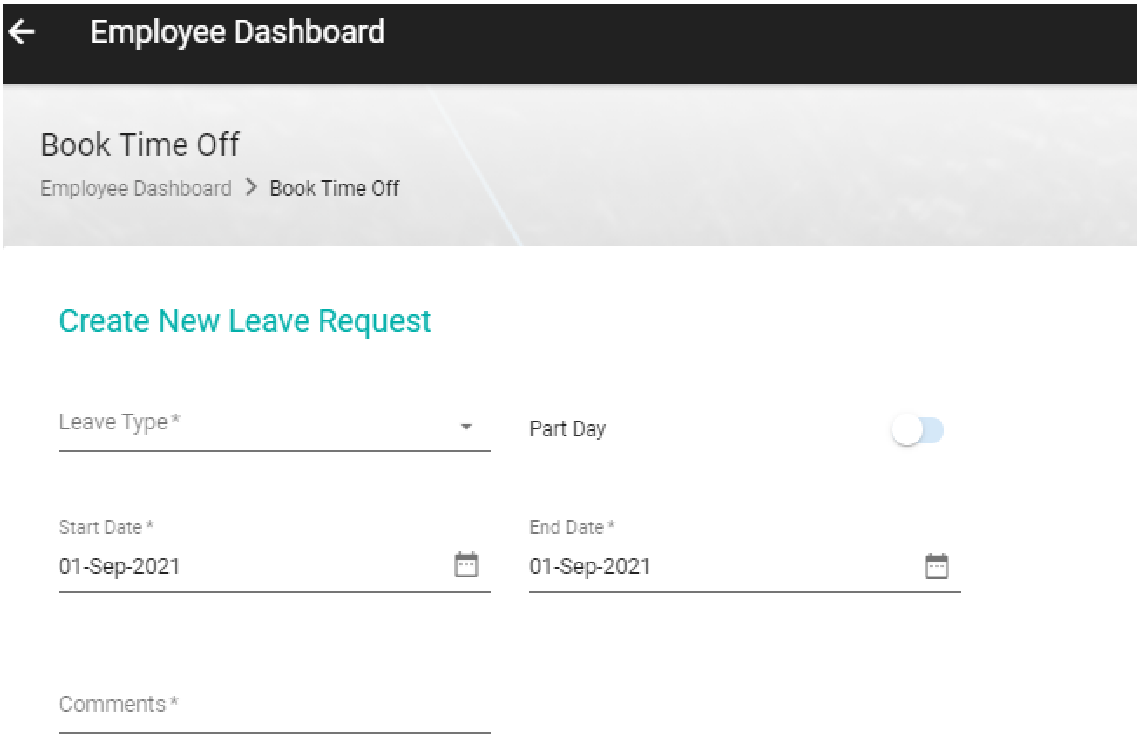
The *Balance Information* screen displays.

To submit a *Leave Requests* from the *My Requests* widget:

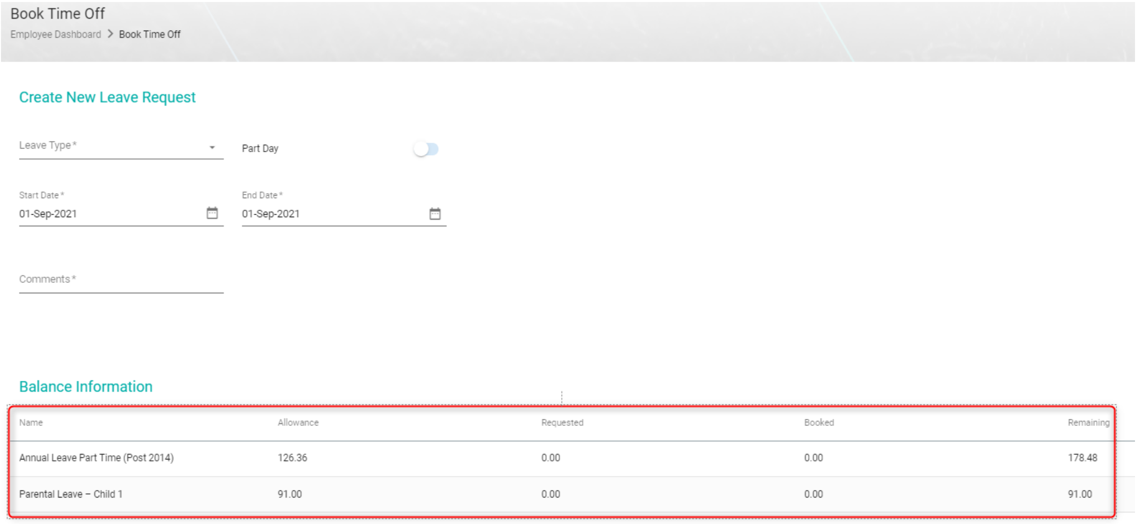
1. Click the **Book Time Off** button.



The *Book Time Off – Create New Leave Request* screen displays.

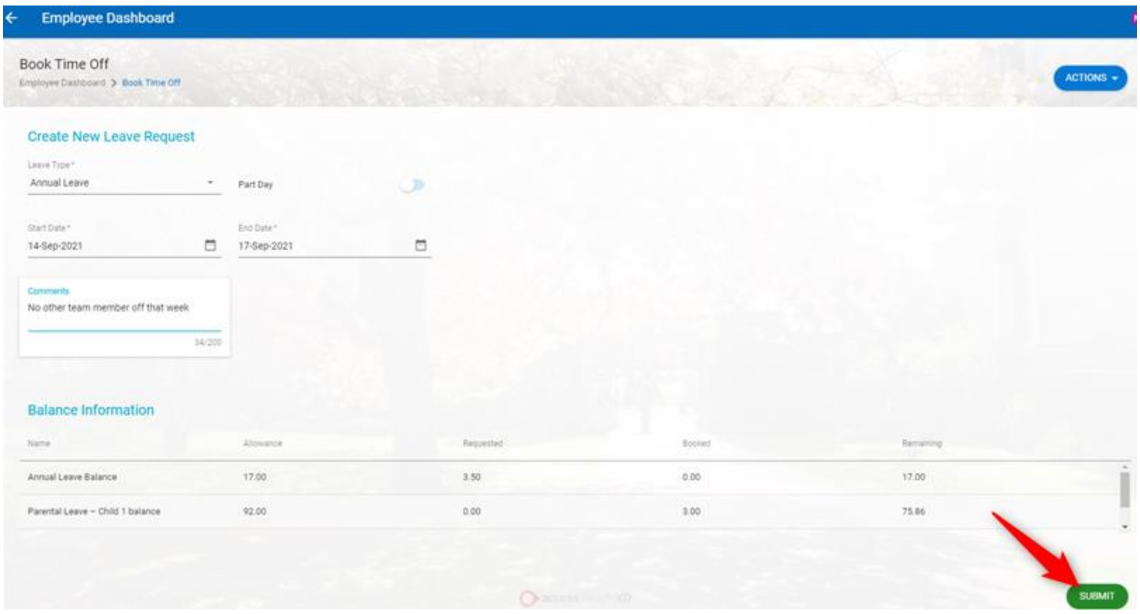


Balance information for all balance types assigned to your employee record are displayed at the bottom of the screen

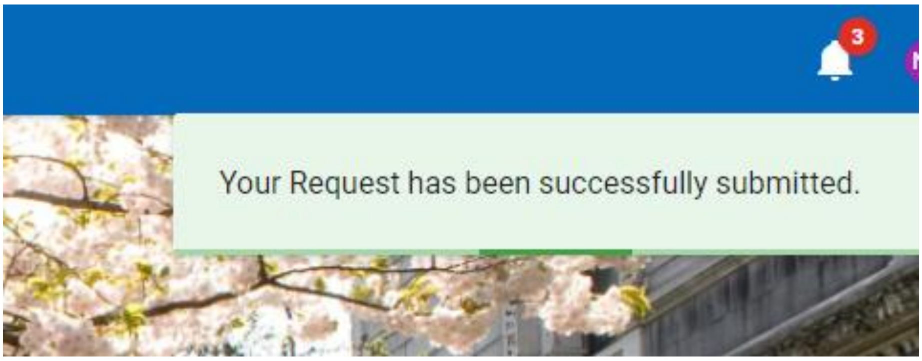


Note: For Part Time staff, holiday balances are calculated in hours. For Full Time staff it is calculated in days.

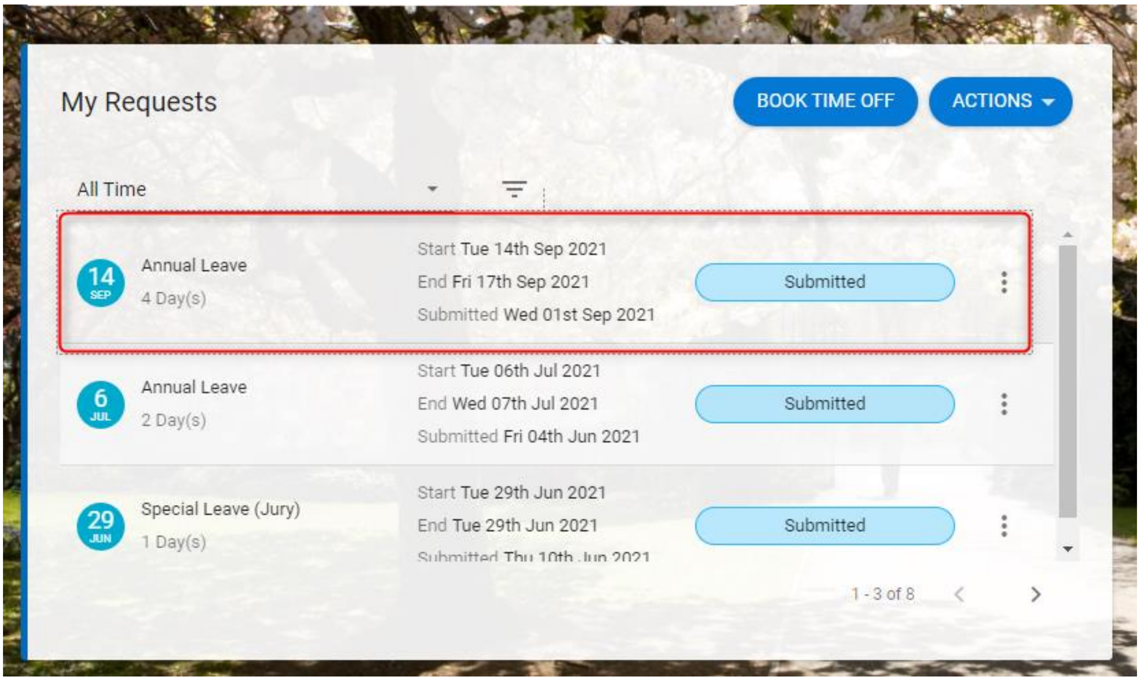
2. Select the applicable *Leave Type* from the drop-down list.
3. Enter the *Start Date*.
4. Enter the *End Date*.
5. Select a *Reason* from the drop-down list, if applicable.
6. Add *Comments*.
7. Click **Submit**.



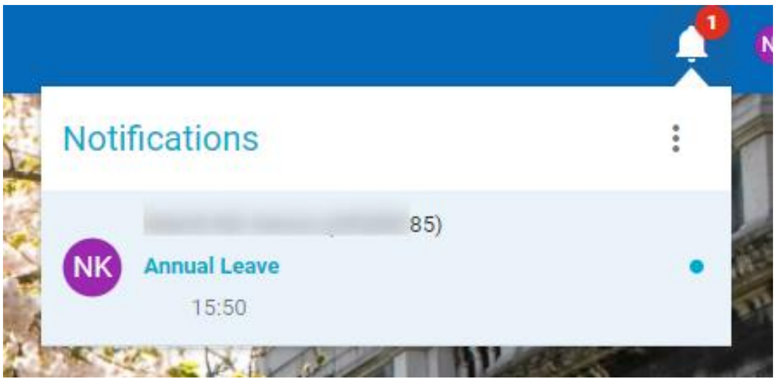
This ‘Annual Leave’ *Leave Request* has now been submitted successfully and a notification will appear confirming you request has been submitted

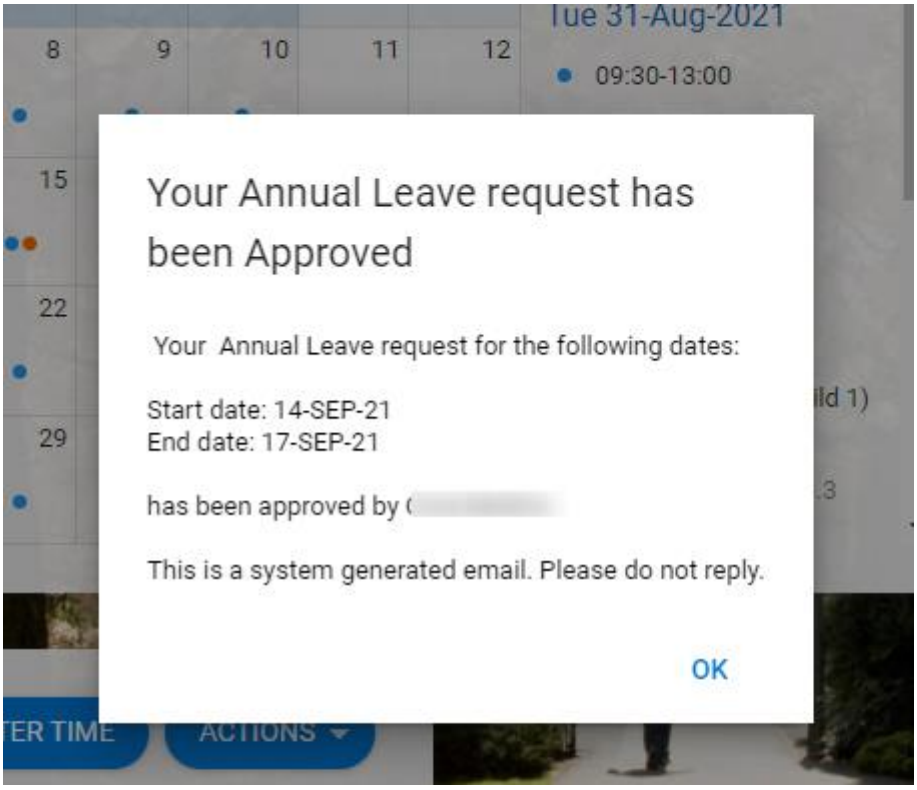


You will see the *submitted* leave request in the My Requests Widget until it has been approved by your manager:

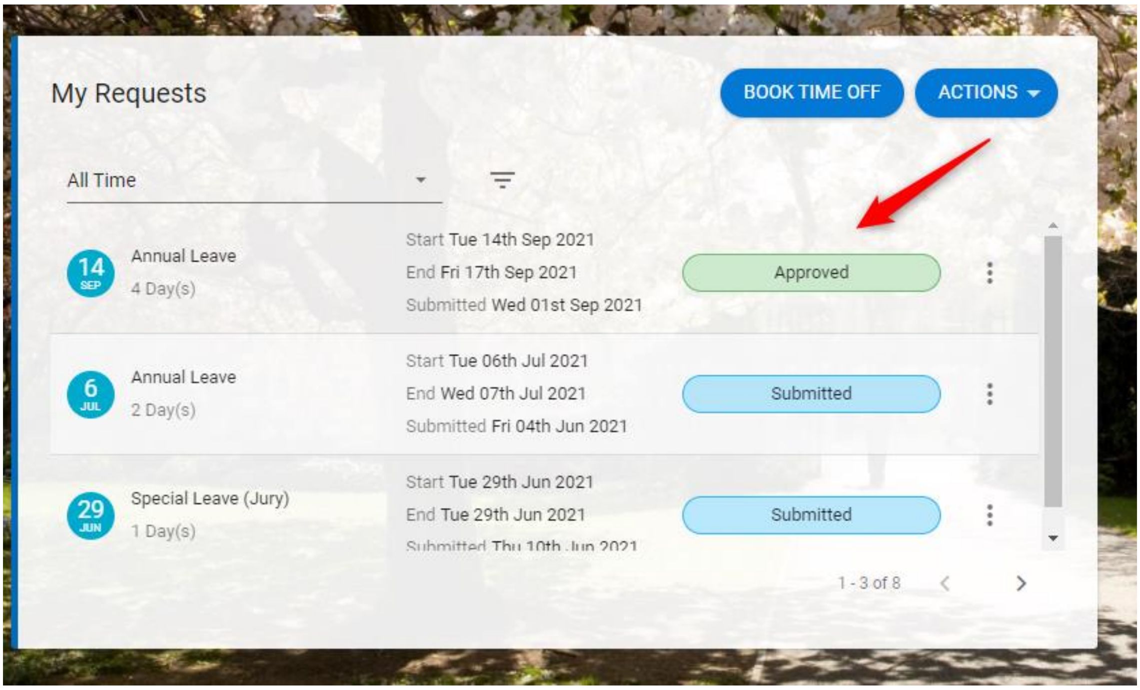


You will receive a notification and an email once your manager approves or rejects the leave request:





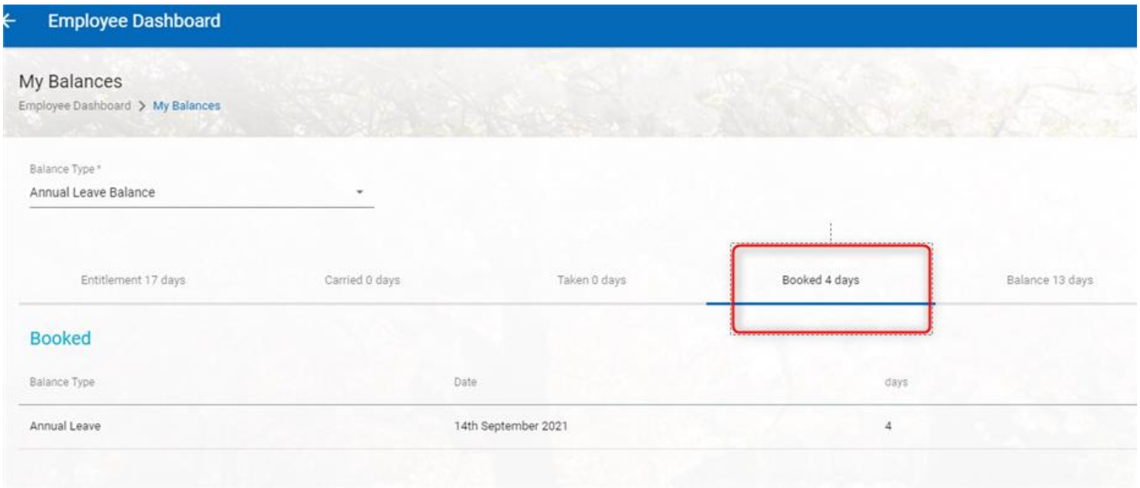
It will now appear as approved leave in your My Request widget



To view the details of the request

1. Click the Actions button in MyRequests section.
2. Select Expanded View.

When leave request is approved, the employee's balance will also be adjusted and will appear under the Booked days off tab under My Balances:



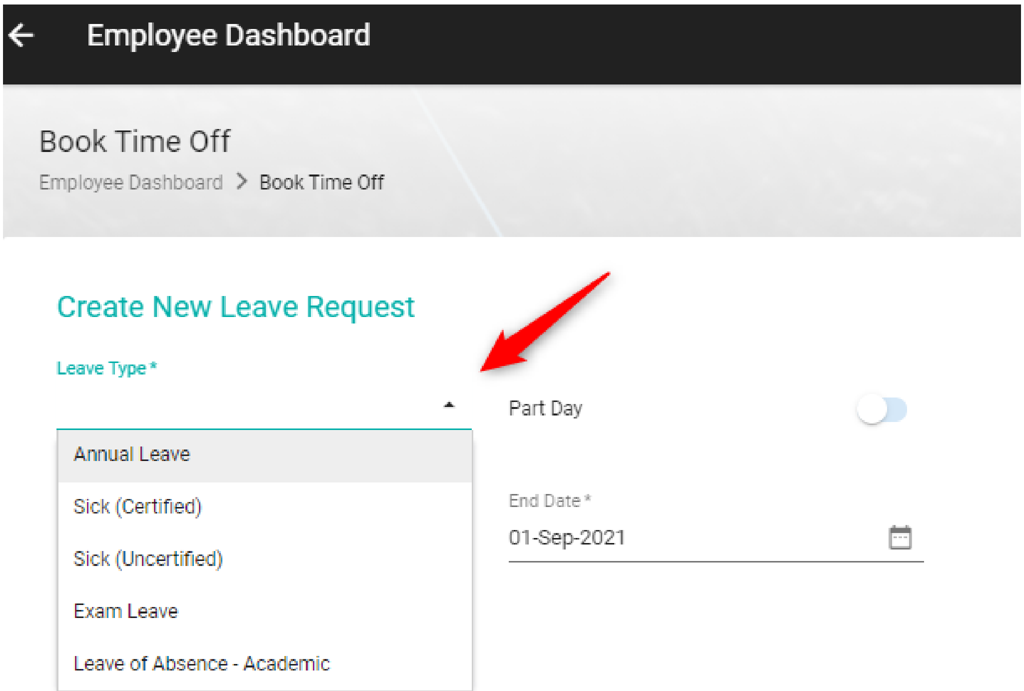
Submitting Part Day Leave Requests

To submit a part day *Leave Request*

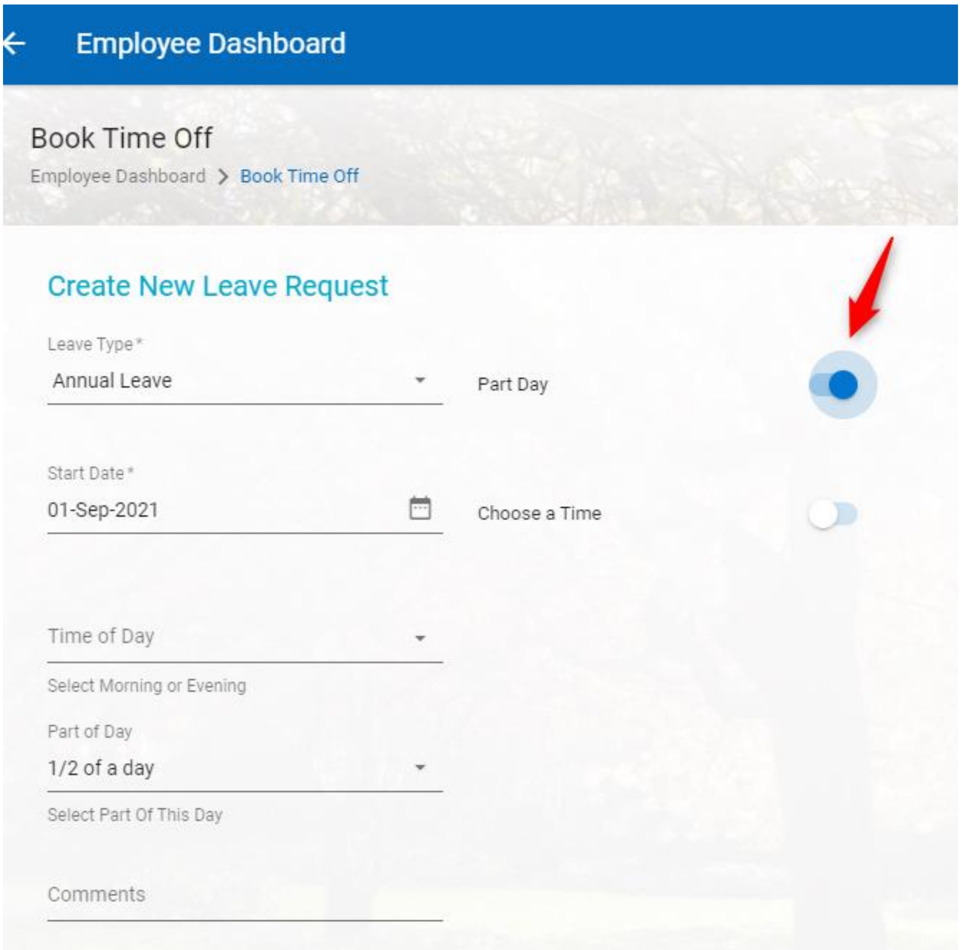
1. *Click the **Book Time Off** button.*

The Book Time Off – *Create New Leave Request screen* displays.

2. Select the applicable *Leave Type* from the drop-down list.



3. Switch **On** the *Part Day* indicator



4. Enter the *Start Date*.

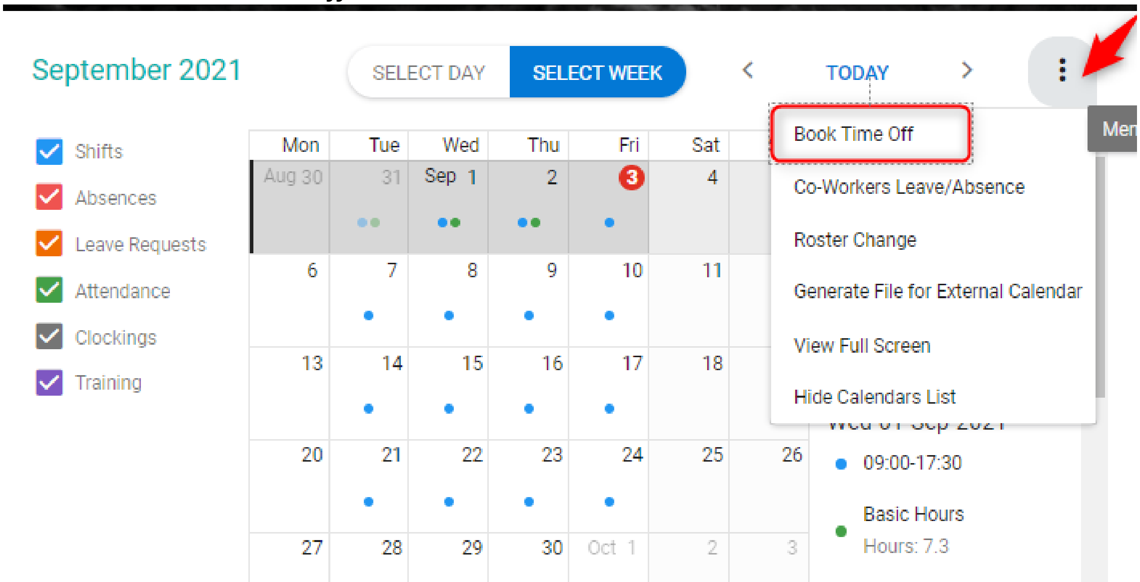
5. Select the time of day from the drop-down list, morning, or evening.

6. Add *Comments* if applicable.

7. Click **Submit**.

You can also use the shortcut on the calendar widget to Book Time Off

1. Click ⋮ on the top right-hand corner of the calendar
2. Click *Book Time Off.*



The same screens for creating a new leave request as per the above instructions will appear.

There are different options to see your absences and leave requests – through Calendar, expanded view of MyRequests widget, or through MyProfile.

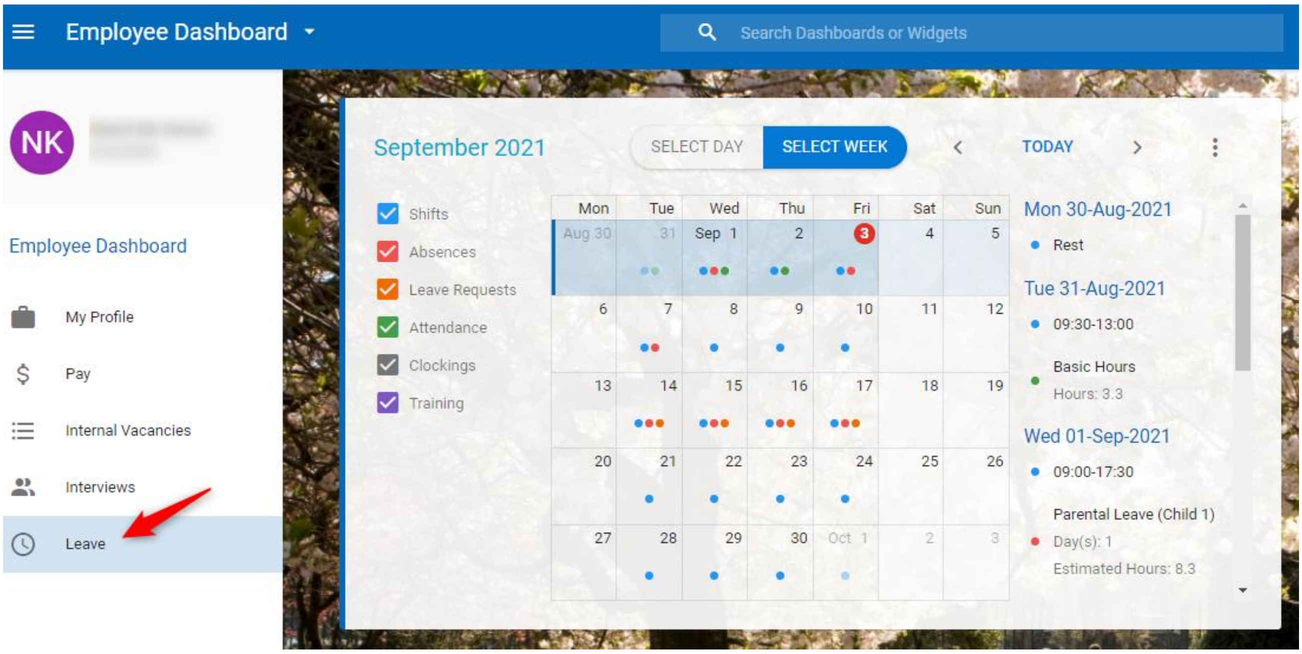
Calendar view

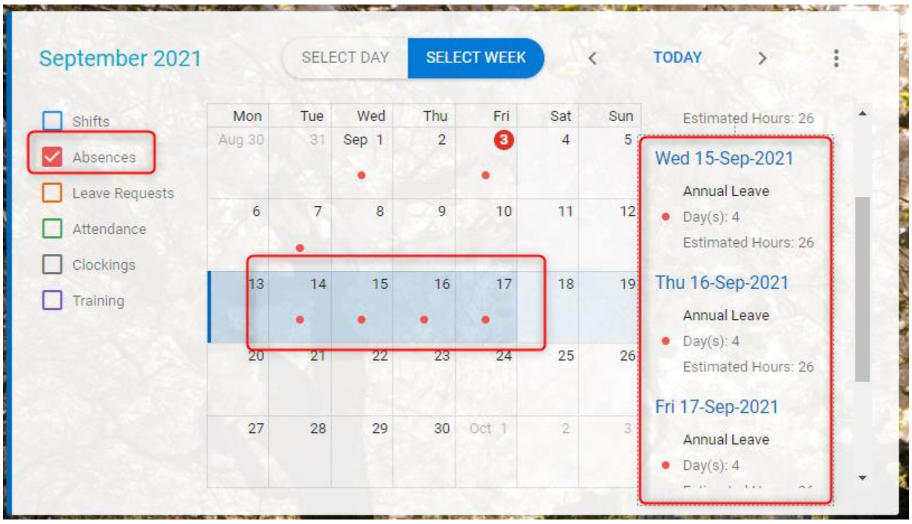
When a Leave Request is submitted, it shows in your Calendar as Request, but once that date has passed, it is seen as historical within the system. This Leave Request then shows as an Absence.

1. To view Absences via the Calendar widget, click on the leave widget and the Calendar will be the first section you will see.
2. Tick the item you want to see displayed in your Calendar – Absences or Leave Requests.

An orange icon displays on the applicable date where a Leave Request occurs. Once in the past they will turn into absences and a Red icon will display on the applicable dates where Absences occur.

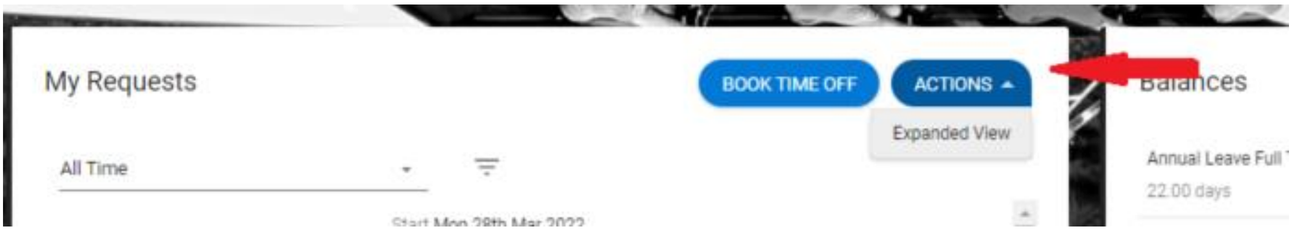
It is possible to click on the applicable date or week. This displays additional detail, regarding the absences, to the right of the Calendar widget. This is highlighted in the below screenshot.





MyRequests Expanded View

1. Go to MyRequests widget
2. Click Actions
3. Select Expanded View

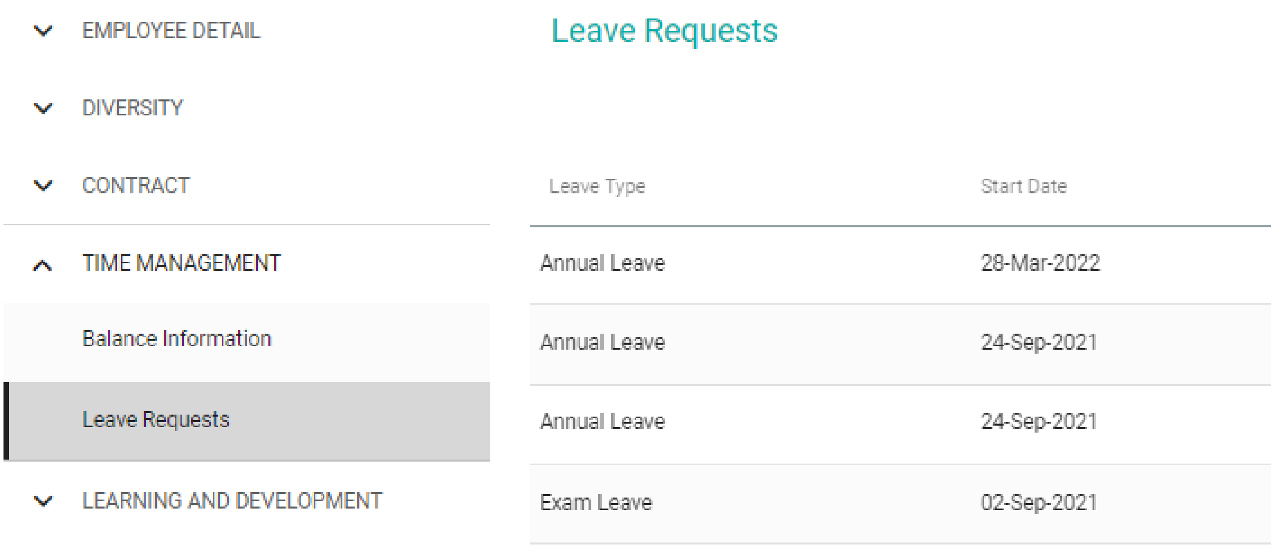


On the next screen you will be able to easily scroll through your request history. You will see details of your previous requests, their details and status (if it was approved, rejected or cancelled).

MyProfile Leave Requests

Similar information summary regarding your leave request history you can access through your profile.

1. Click on your profile icon in the top right corner
2. Select My Profile
3. Go to Time Management menu
4. Click on Leave Requests



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We hope you will find our new ELeave platform useful and easy to work with.

We invite you to visit our [webpage for ELeave](), where you can find user guides, FAQ and we will be gradually adding other useful information as the project develops.

If you have questions, please direct them to ELeave@tcd.ie. We will be happy to hear your feedback and suggestions.