



**Trinity College Dublin**

Coláiste na Tríonóide, Baile Átha Cliath

The University of Dublin

# CorePortal Leave Module

## User Guide for Employees

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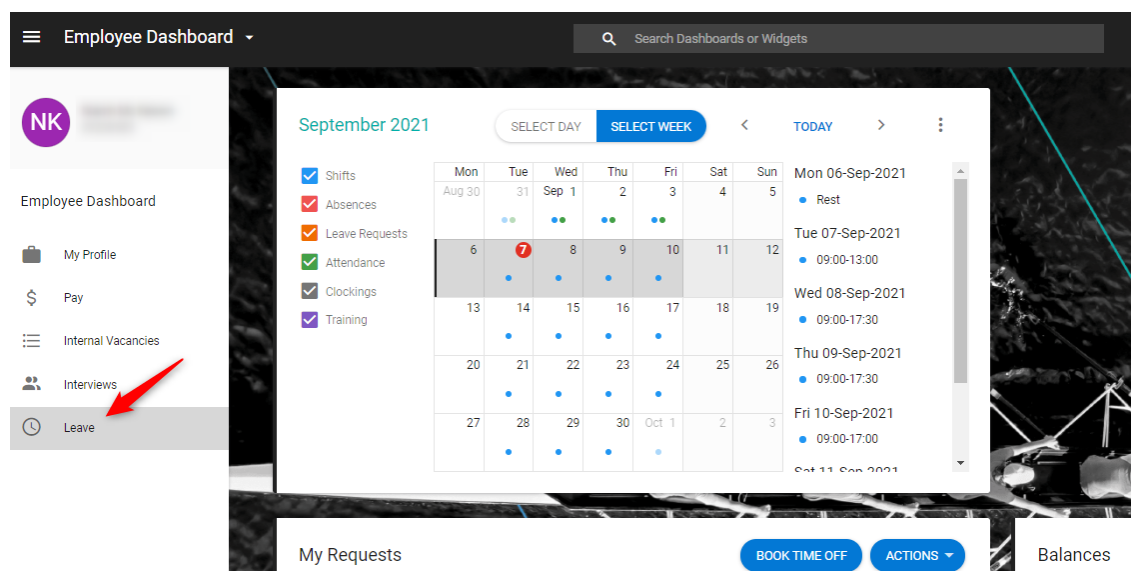
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The purpose of this document is to provide an overview of the functionality in the *Electronic Recording of Leave* (ELeave) module in Core Portal. A link to Core Portal can be found on the HR webpage at [tcd.ie/hr](http://tcd.ie/hr):



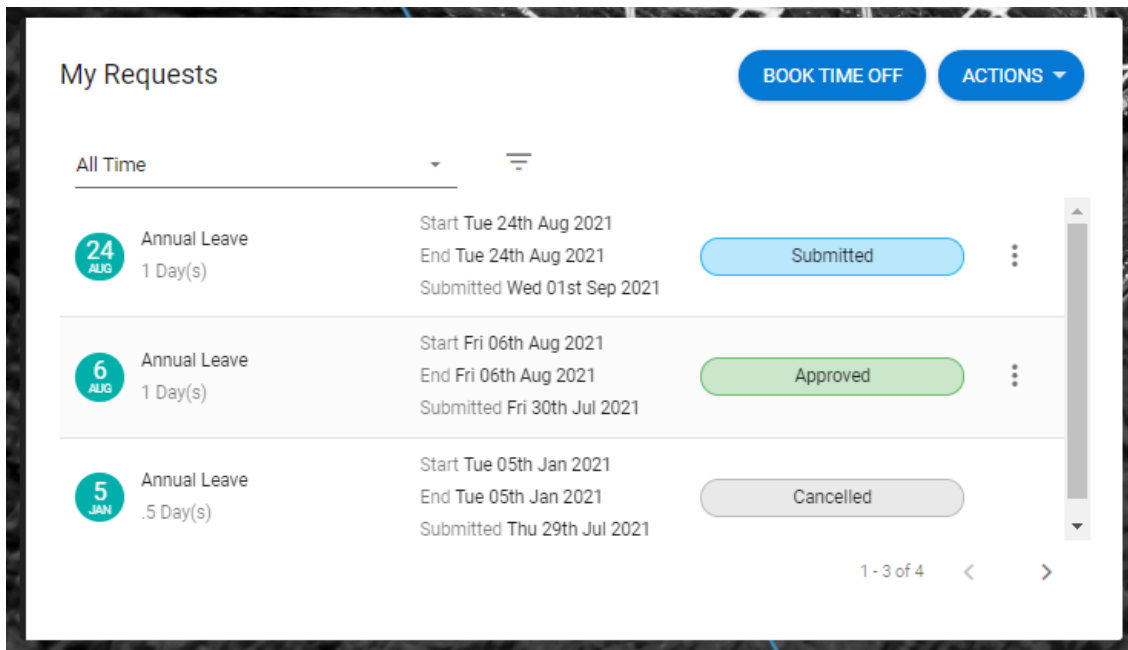
**Tip:** [Direct link to CorePortal](#) can also be added to your browser's bookmarks to allow you quick access whenever you need it.

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.



## Navigating Calendar

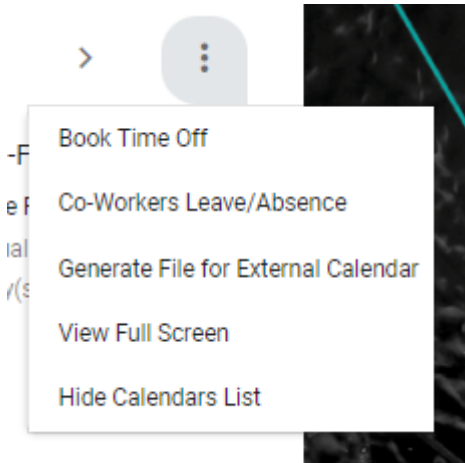
The calendar is an aid that allows you easily track your work pattern, leave requests and other details.

The screenshot shows a calendar for February 2022. At the top, there are buttons for "SELECT DAY" and "SELECT WEEK", along with navigation arrows and a "TODAY" button. On the left, a list of categories is shown with checkboxes: Shifts (checked), Absences (checked), Leave Requests (checked), Attendance (checked), Clockings (checked), and Training (checked). The main calendar grid shows days from Jan 31 to Mar 6. The 21st of February is highlighted in grey. On the right, a detailed view for Monday, Feb 21, 2022, is shown, listing events: "08:00-16:30 Annual Leave" (Day(s): 1, Estimated Hours: 7.3) and "08:00-16:30 Leave Request" (Annual Leave, 1 Day(s)).

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:

This screenshot shows the same calendar interface, but with the "SELECT DAY" button selected. The calendar grid is now only showing the details for Monday, Feb 21, 2022. The left-hand category list is updated: "Shifts", "Absences", "Attendance", "Clockings", and "Training" are now unchecked, while "Leave Requests" remains checked. The detailed view on the right now only shows the "08:00-16:30 Leave Request" (Annual Leave, 1 Day(s)) event.

## 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:

Absences Only



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

Mon 17th	Tue 18th	Wed 19th	Thu 20th	Fri 21st
Approved Absence (Taken)				
				Approved Absence (Taken)

### 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.


All updates since last file creation

#### Date Range

Please enter the date range you want to export to .ics files. This will export all inserts, updates and deletes entered between the specified data range.

Date From   Date To

**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:

Today < > 28 March - 1 April 2022

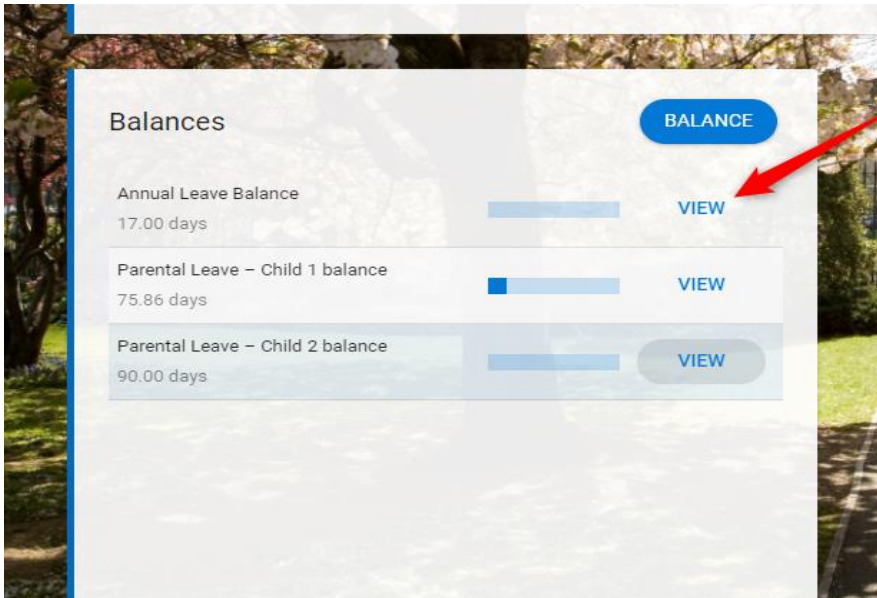
Calendar - [redacted] ×		→ Core Calendar ×
Monday	Tuesday	Wednesday
28	29	30
Annual Leave ; core@core.com		

## Viewing Balances

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.

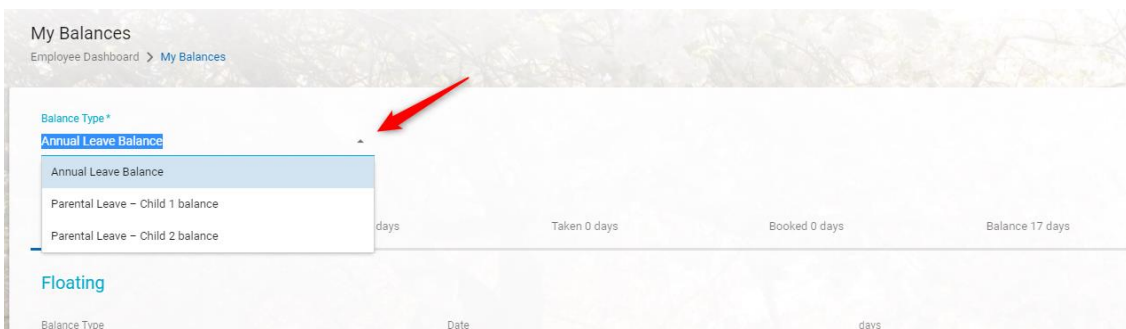


In this example, the 'Annual Leave' *Balance Type* is selected.

The *My Balances* screen displays.

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

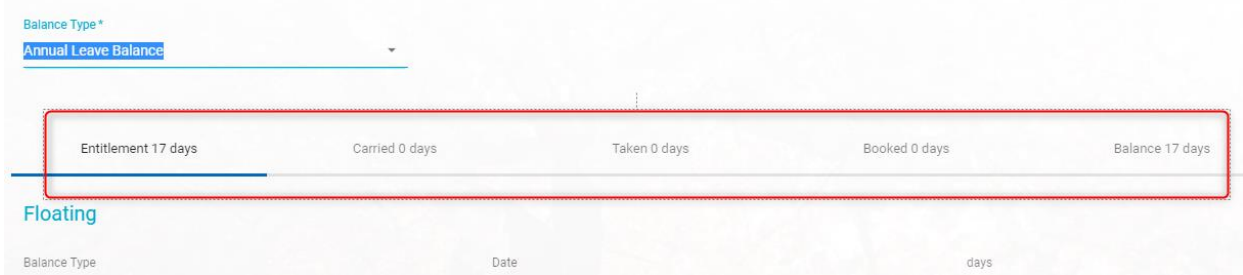
Here it is possible to specify a different *Balance Type*, if required, as highlighted below.



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

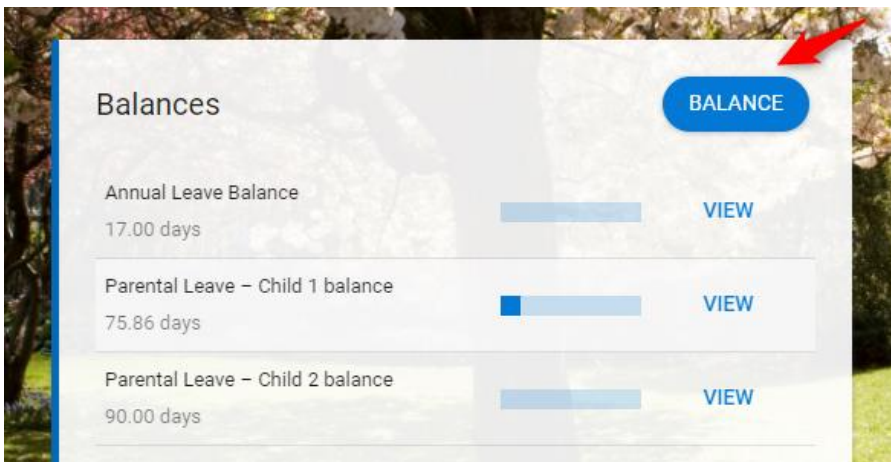
- **Balance** – summary of days left to be used



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
<b>Floating</b>				
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.

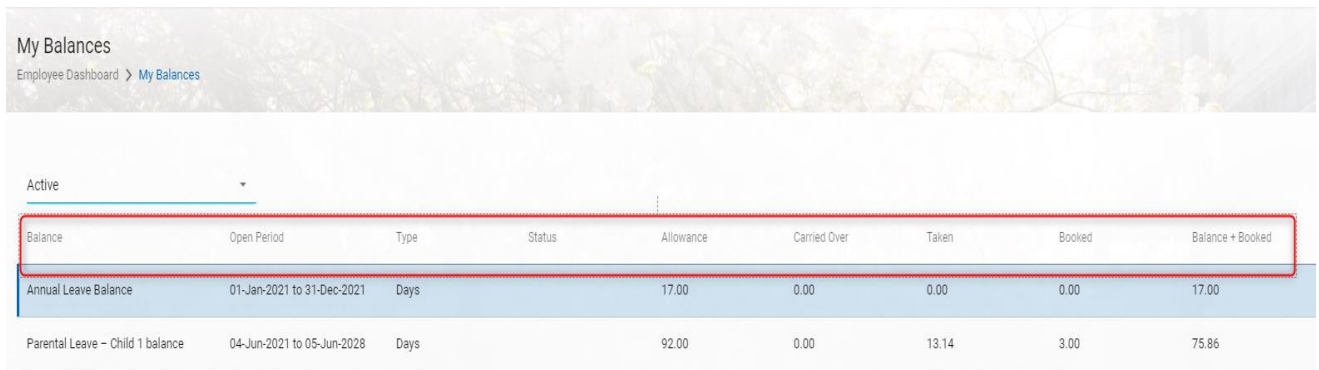


The *My Balances* screen displays.

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*:



The screenshot shows the 'My Balances' screen with a table of balance types. The table has the following columns: Balance, Open Period, Type, Status, Allowance, Carried Over, Taken, Booked, and Balance + Booked. The first row is highlighted with a red box.

Balance	Open Period	Type	Status	Allowance	Carried Over	Taken	Booked	Balance + Booked
Annual Leave Balance	01-Jan-2021 to 31-Dec-2021	Days		17.00	0.00	0.00	0.00	17.00
Parental Leave - Child 1 balance	04-Jun-2021 to 05-Jun-2028	Days		92.00	0.00	13.14	3.00	75.86

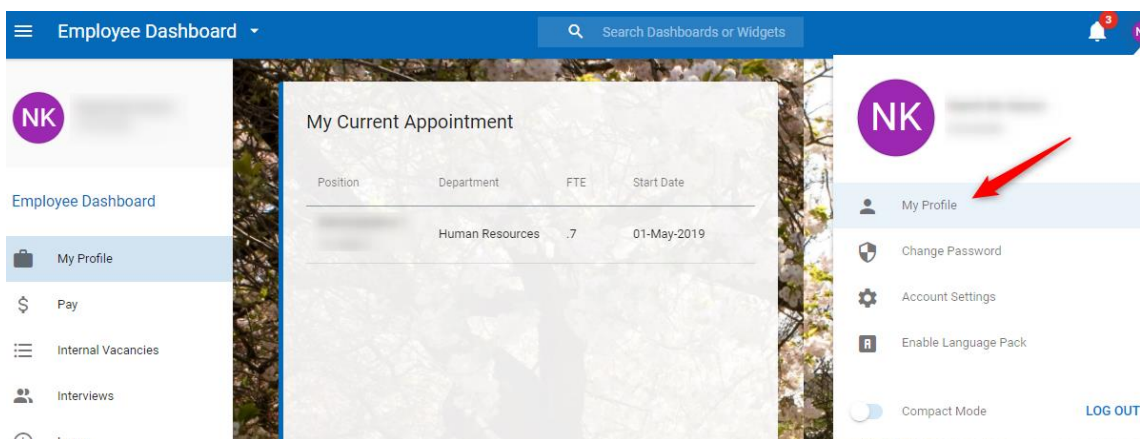
Under *Allowance*, similarly to *Entitlement*, value given is calculated from the base annual leave entitlement for the person with Christmas Closure days already deducted.

## My Profile

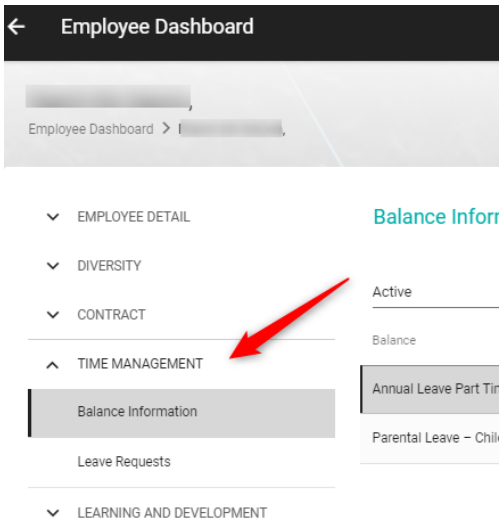
It is also possible to view balance information via the *Balance Information* screen, accessed from *My Profile*.

To access the *Balance Information* screen:

1. Select **My Profile**.



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



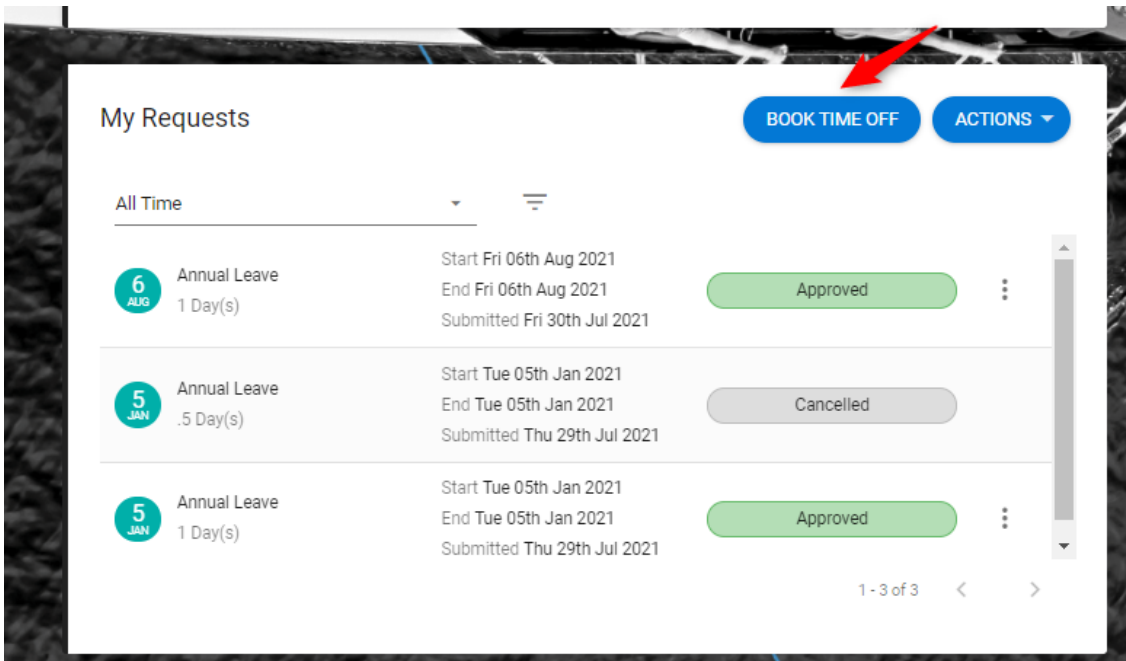
3. Select **Balance Information**.

The *Balance Information* screen displays.

## Submitting Leave Requests

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.

The screenshot shows the 'Book Time Off – Create New Leave Request' form. The top navigation bar includes a back arrow and the text 'Employee Dashboard'. Below this, the title 'Book Time Off' is displayed, followed by the breadcrumb 'Employee Dashboard > Book Time Off'. The main heading is 'Create New Leave Request'. The form contains the following fields:

- Leave Type\***: A dropdown menu.
- Part Day**: A toggle switch, currently turned on.
- Start Date\***: A date field with a calendar icon, showing '01-Sep-2021'.
- End Date\***: A date field with a calendar icon, showing '01-Sep-2021'.
- Comments\***: A text input field.

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

Book Time Off  
Employee Dashboard > Book Time Off

Create New Leave Request

Leave Type\*  Part Day

Start Date\* 01-Sep-2021 End Date\* 01-Sep-2021

Comments\*

Balance Information

Name	Allowance	Requested	Booked	Remaining
Annual Leave Part Time (Post 2014)	126.36	0.00	0.00	178.48
Parental Leave - Child 1	91.00	0.00	0.00	91.00

**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**.

Employee Dashboard

Book Time Off  
Employee Dashboard > Book Time Off

ACTIONS

Create New Leave Request

Leave Type\* Annual Leave Part Day

Start Date\* 14-Sep-2021 End Date\* 17-Sep-2021

Comments  
No other team member off that week  
34/200

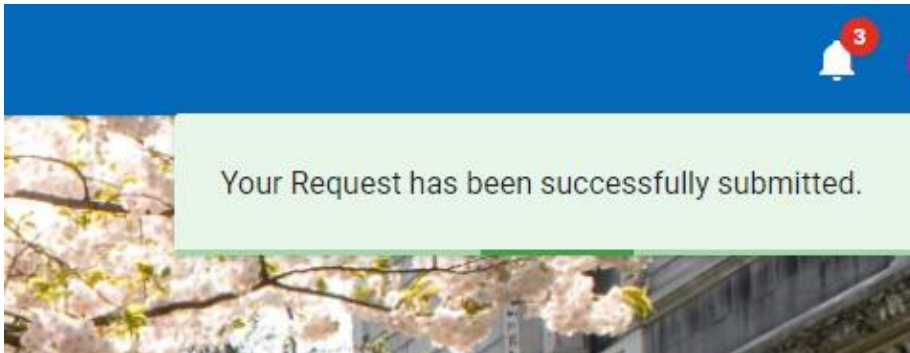
Balance Information

Name	Allowance	Requested	Booked	Remaining
Annual Leave Balance	17.00	3.50	0.00	17.00
Parental Leave - Child 1 balance	92.00	0.00	3.00	75.86

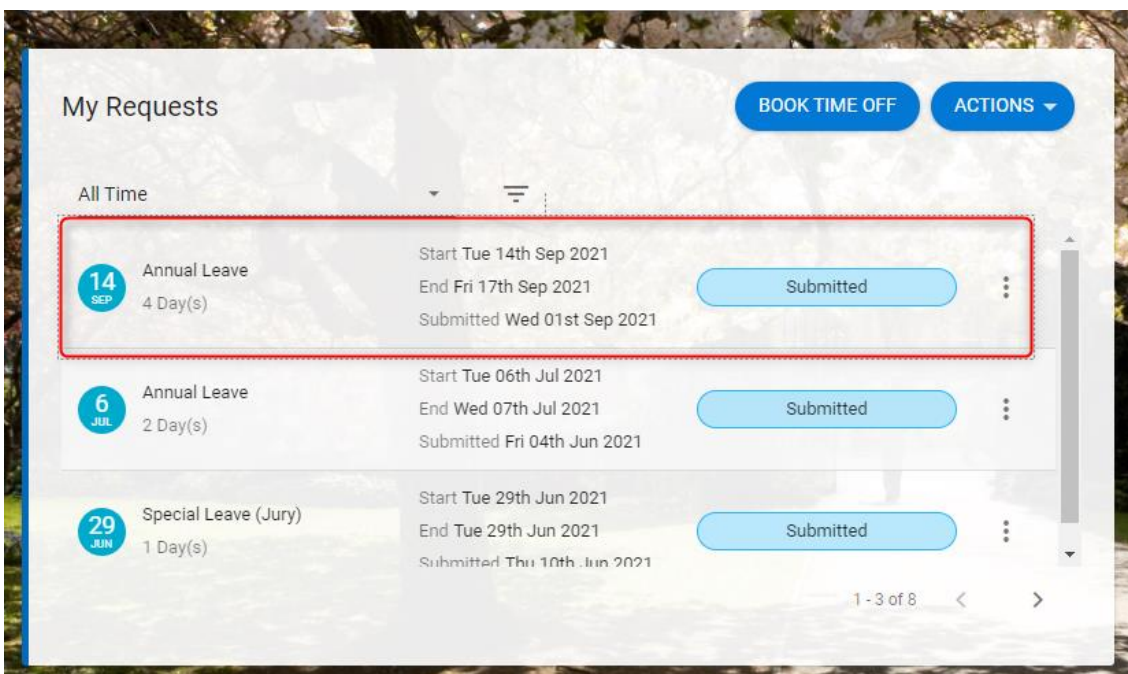
ACCESS POINT ID

SUBMIT

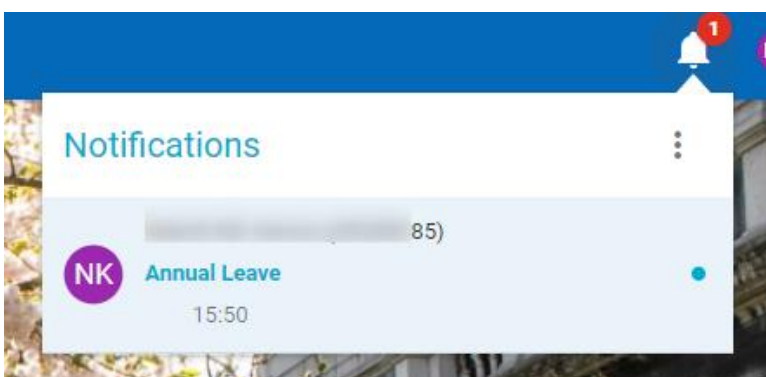
This 'Annual Leave' *Leave Request* has now been submitted successfully and a notification will appear confirming you request has been submitted

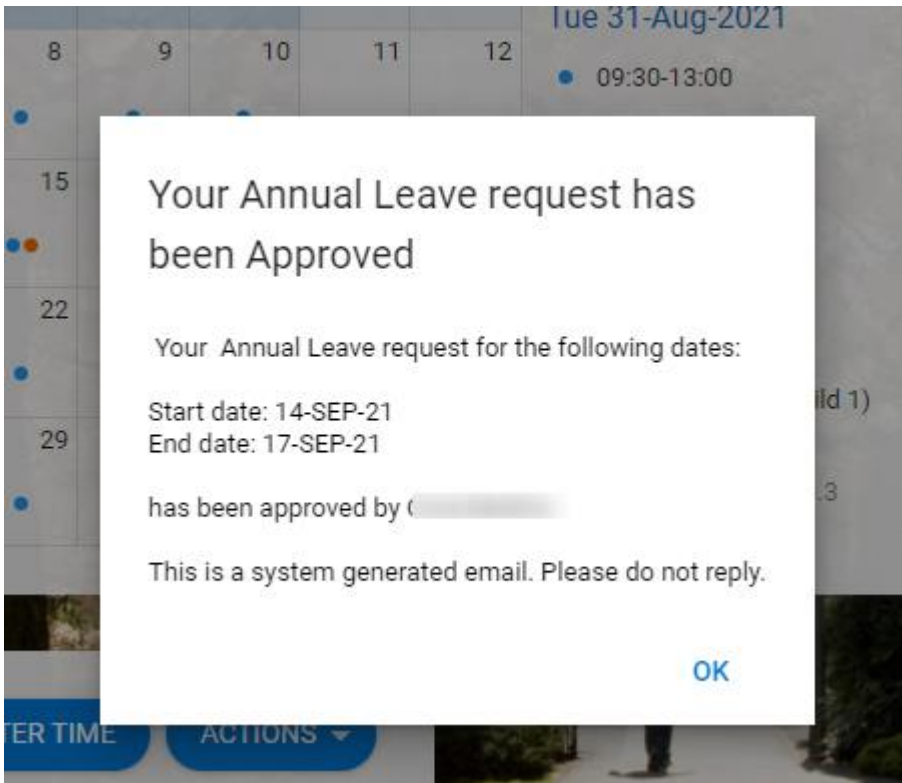


You will see the *submitted* leave request in the My Requests Widget until it has been approved by your manager:

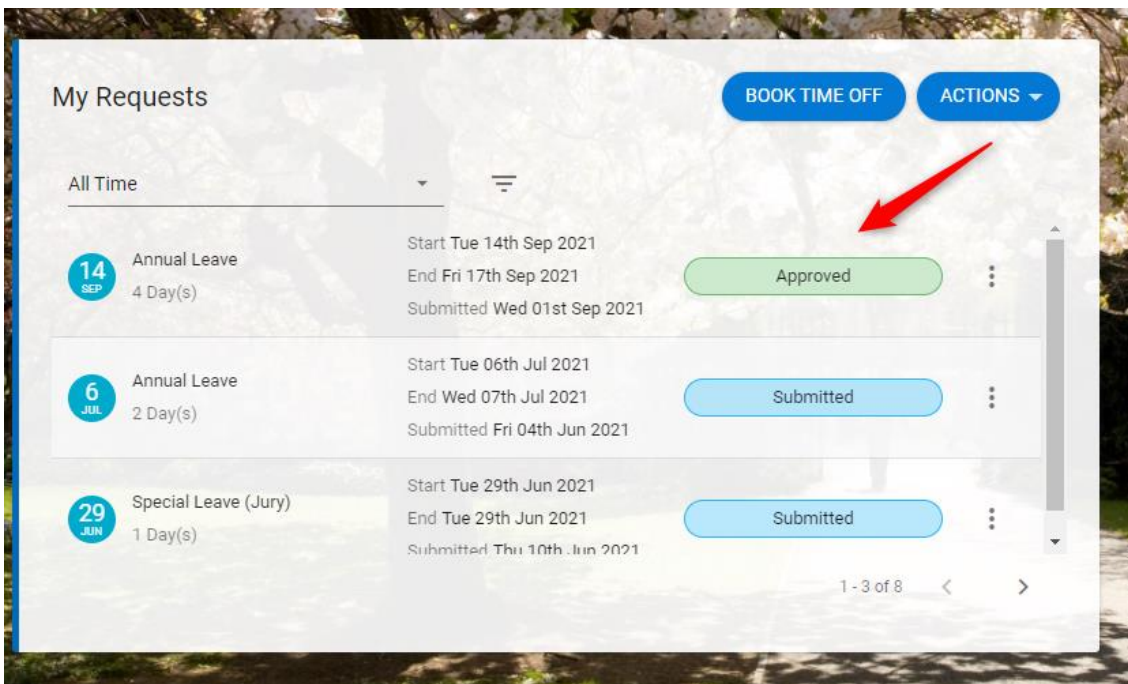


You will receive a notification and an email once your manager approves or rejects the leave request:





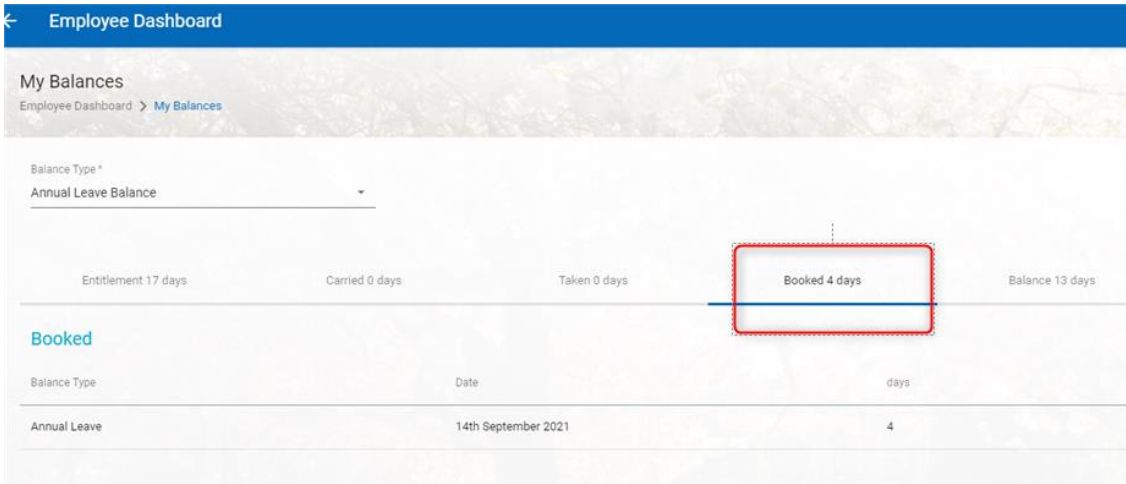
It will now appear as approved leave in your My Request widget



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:



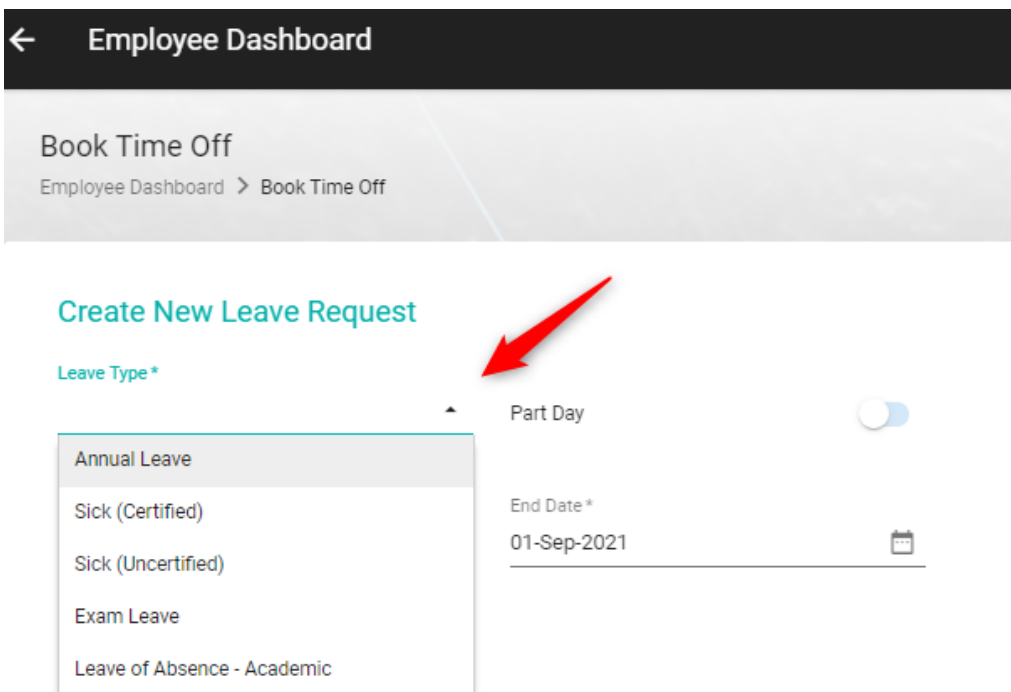
## Submitting Part Day Leave Requests

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

The screenshot shows the 'Employee Dashboard' with a 'Book Time Off' section. Below this is the 'Create New Leave Request' form. The form has several fields: 'Leave Type\*' with a dropdown menu set to 'Annual Leave', a 'Part Day' toggle switch (indicated by a red arrow), 'Start Date\*' with a calendar icon and the date '01-Sep-2021', a 'Choose a Time' toggle switch, 'Time of Day' with a dropdown menu set to 'Select Morning or Evening', 'Part of Day' with a dropdown menu set to '1/2 of a day', and a 'Comments' text area.

4. Enter the *Start Date*.


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

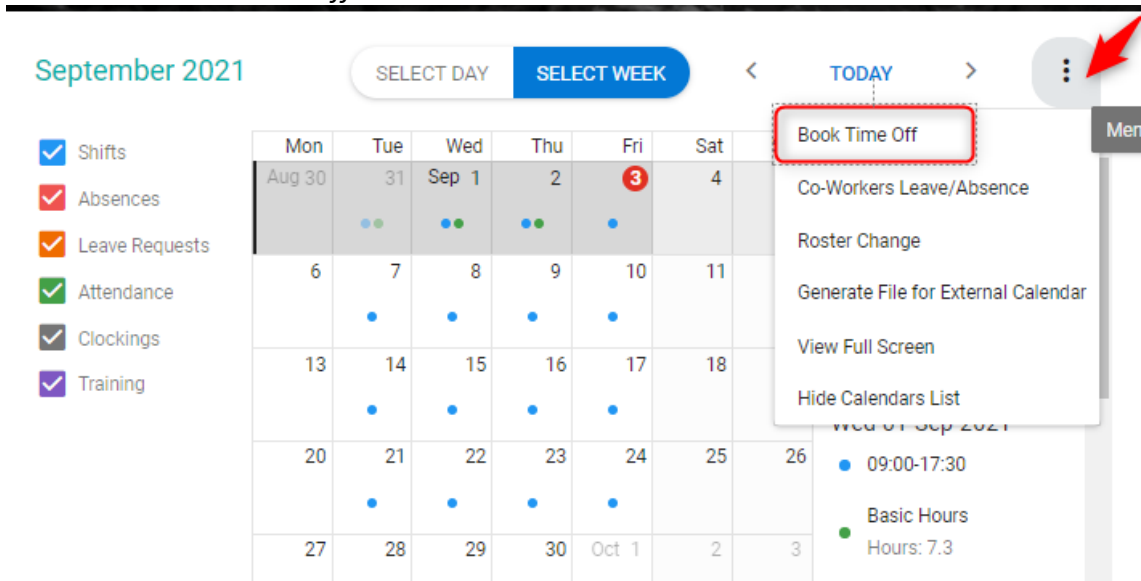
6. Add *Comments* if applicable.

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.

## Viewing Leave Requests & Absences

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

### Calendar view

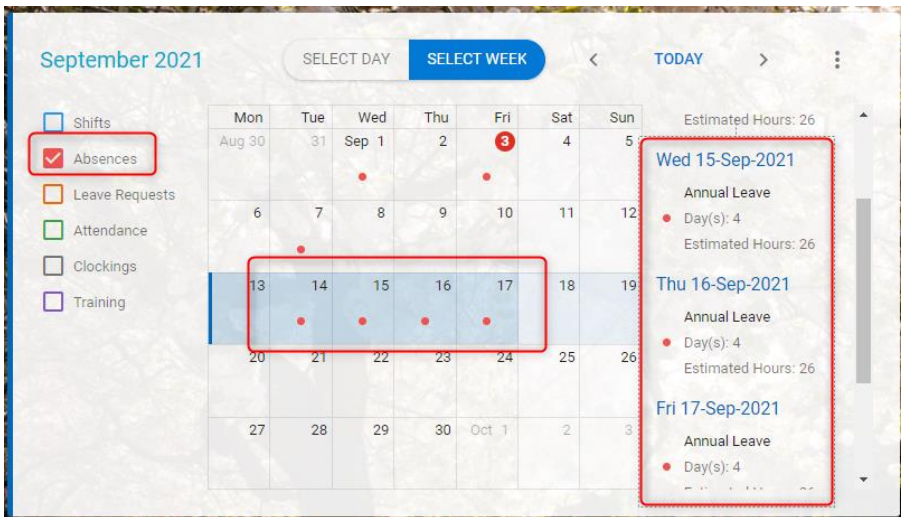
When a Leave Request is submitted, it shows in your Calendar as Request, but once that date has passed, it is seen as historical within the system. This Leave Request then shows as an Absence.

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.

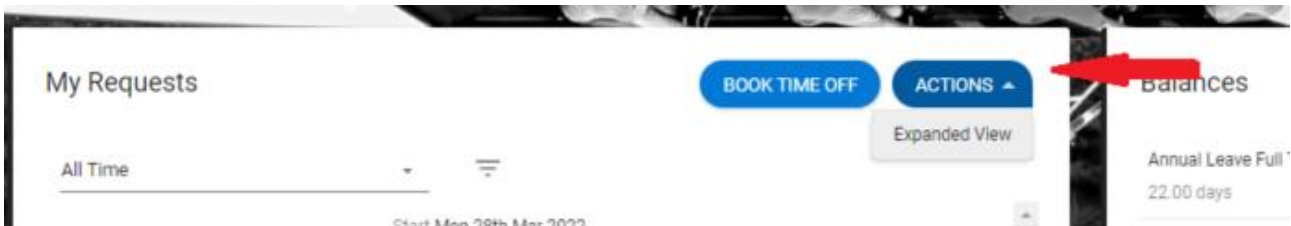
It is possible to click on the applicable date or week. This displays additional detail, regarding the absences, to the right of the Calendar widget. This is highlighted in the below screenshot.

The screenshot displays the Employee Dashboard interface. On the left, the 'Employee Dashboard' sidebar is visible, with the 'Leave' widget highlighted by a red arrow. The main content area shows a calendar for September 2021. The calendar grid includes dates from August 30 to October 3. A red icon is present on Friday, August 30, 2021. To the right of the calendar, a detailed view of the absence for Monday, August 30, 2021, is shown, including 'Rest' and 'Parental Leave (Child 1)' with a duration of 8.3 hours.



## 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

- ▼ EMPLOYEE DETAIL
- ▼ DIVERSITY
- ▼ CONTRACT
- ▲ TIME MANAGEMENT
- Balance Information
- Leave Requests
- ▼ LEARNING AND DEVELOPMENT

## Leave Requests

Leave Type	Start Date
Annual Leave	28-Mar-2022
Annual Leave	24-Sep-2021
Annual Leave	24-Sep-2021
Exam Leave	02-Sep-2021

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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](mailto:ELeave@tcd.ie). We will be happy to hear your feedback and suggestions.