CorePortal Leave Module
User Guide

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The purpose of this document is to provide an overview of the Leave Requests and Absences functionality in the *Electronic Recording of Leave (EROL)* module.

EROL allows employees 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.
It is possible for employees to view their balance information from the *Balances* widget.

To view individual balance information:

1. Click **View** 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
- Carried over
- Taken
- Booked
- Balance

To view information on all *Balance Types*:

2. Click **Balance**.

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*:
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 button on the applicable Leave Request.
2. Select View Details.

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The employees balance will also be adjusted and will appear under the Booked days off tab under My Balances:

![Employee Dashboard]

**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.

![Create New Leave Request]
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.
When a Leave Request date has passed, it is seen as historical within the system. This Leave Request then shows as an Absence.

It is possible for employees to view their Absences and Leave Requests via the Calendar widget.

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 Absences.

Red icons now 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.
2. Tick Leave Requests.

An orange icon now displays on the applicable date where a Leave Request occurs. It is possible to click on the applicable date or week. This displays additional detail, regarding the Leave Request, to the right of the Calendar widget. This is highlighted in the below screenshot.