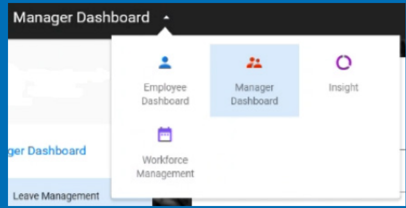
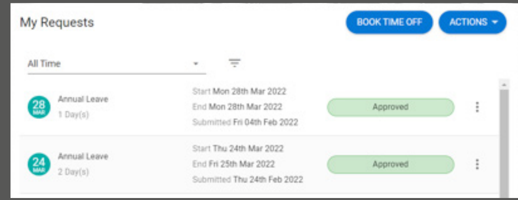
ELeave guide for Managers

To access Core Portal, go to **TCD.ie/hr** and click link to Core Portal.

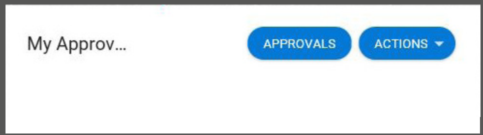


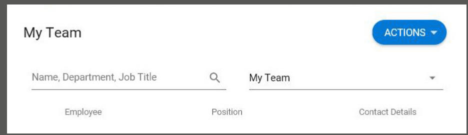


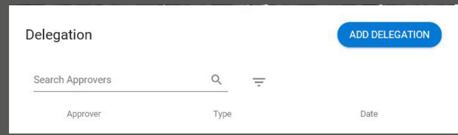
Employee Dashboard

This shows your leave requests

Dashboards Available to Managers







How to approve leave

Go to **MyApprovals**

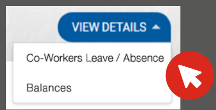
Select request to review

Click Reject or Approve

Note: if rejecting, you must give reason

WHEN APPROVING LEAVE REQUEST

- Go to **Approvals**
- Click View Details button in top right corner
- Select Co-Workers Leave/ Absence **OR** Balances
- Click View button for the balance you wish to see



Team overview

HOW TO VIEW EMPLOYEE'S BALANCE

- In **My Team** widget select employee
- Click Menu button
- Select View Profile
- Go to **Time Management**
- Select Balance Information

How to delegate approving leave

- Go to **Delegation** widget
- Click Add Delegation
- Select **Org Role** as Type
- Select person to delegate to
- Select dates when the selected person is to have access to leave approvals
- Tick authorisation box
- Select **Leave Approver** Org Role
- Click Save button

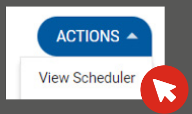
TIP Add **Core Portal** to 'bookmarks' in your browser and have instant access in one click!

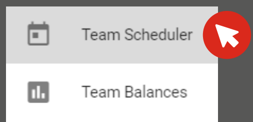
Workforce Management

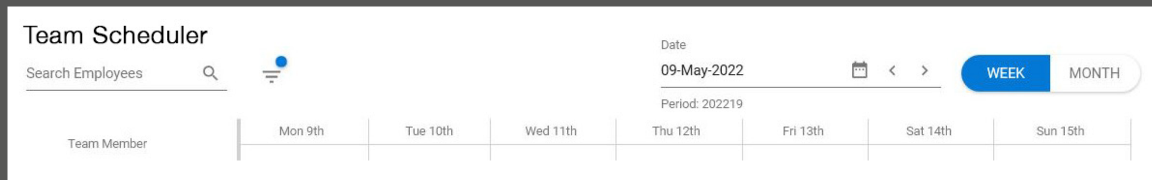
How to access Team Scheduler

In **My Team** widget click Actions button

Select View Scheduler







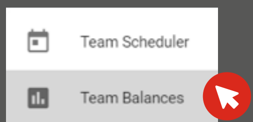
How to access Team Balance

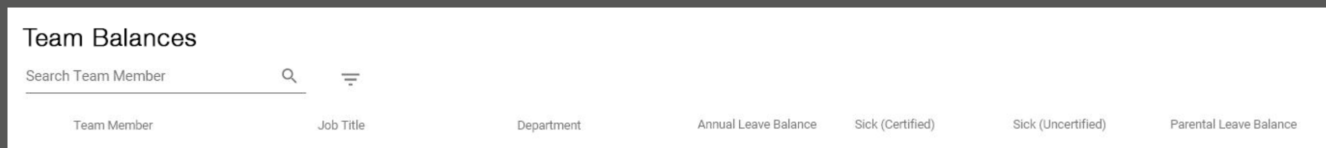
Select Team Balances tab

Balance summary for all your employees will show

To see details, click Menu button

Select Balance Information





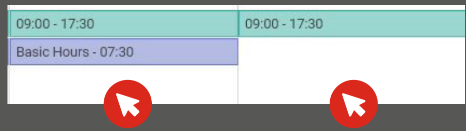
ELeave guide for Managers

CONTINUED

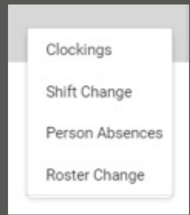
Scheduler

How to access actions in Scheduler?

Click on empty space underneath work pattern



What can I do in Scheduler?



Shift Change changing the general pattern of working hours for a staff member – changes can only be made with future effective date

Person Absence tracking, record and updating absence details for an employee

Roster Change making a change to employee's work pattern on a single day basis.

Absence

How to Add absence?

For NEW absences yet to be recorded on the system:

1. In **Scheduler** click under the work pattern
2. Select Person Absence option
3. Click Add Absence button (top right corner)
4. Select leave details
   - Leave Type from the drop-down list
   - Select dates relevant to the leave
   - Confirm if it is part day, open-ended or recurring absence
5. Click Save

Note: If adding or changing absence to "Sick (Certified)" leave you need to fill in a Reason before saving changes

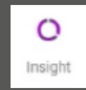
How to Edit absence?

For already RECORDED absences and approved leave requests:

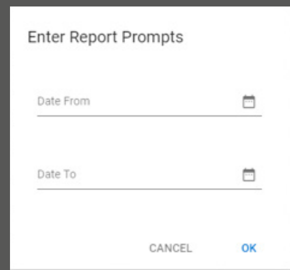
1. In **Scheduler** click under the work pattern
2. Select Person Absence option
3. Click Menu and select View/Edit Absence Details
4. Edit relevant absence details
   - Leave Type from the drop-down list
   - Select dates relevant to the leave
   - Confirm if it is part day, open-ended or recurring absence
5. Click Save

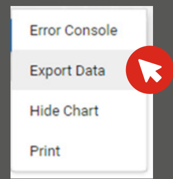
Insight Reports

How to run Insight report?



- Go to **Insight** dashboard to Home tab
- Go to **All reports**
- Use search bar to find report you need
- Click Menu button by report to run
- Select View option
- Click Refresh data button if needed
- Confirm parameters, if appropriate
- Click OK on parameters and report will run
- Click Export data and save file





What Insight reports can tell you?

- If there are any **Absence Patterns** and regularities
- What are your employees' reasons for absence (what leave types they take)
- List of leave balances assigned to your staff with latest data
- A log of Leave Requests approved by you
- Details of work schedule of your employees

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