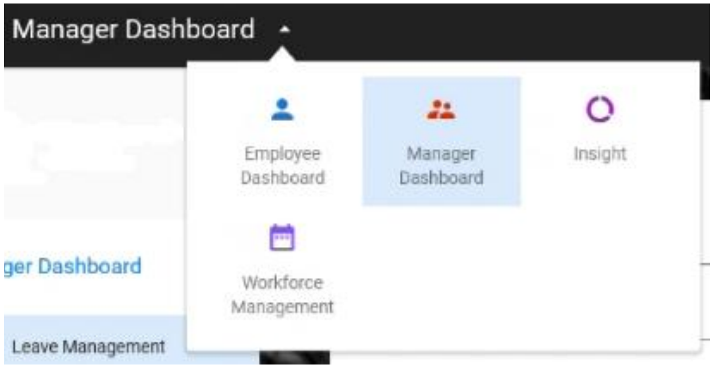
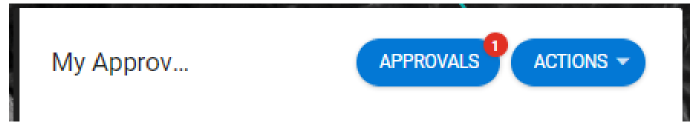
Overview of Dashboards available to Managers

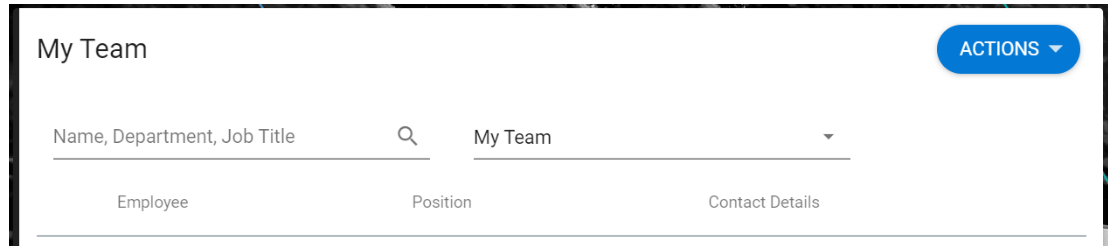


1. Manager Dashboard

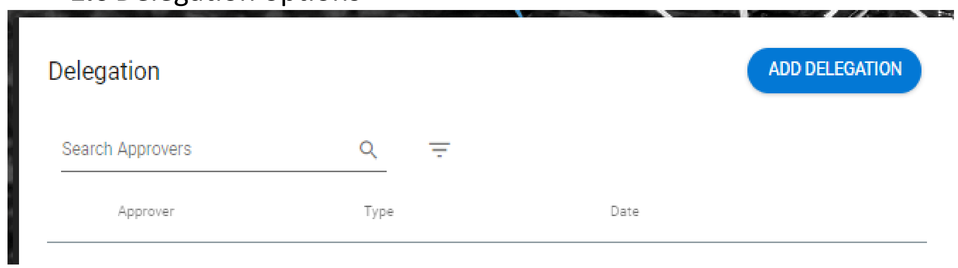
1.a Leave approvals



1.b Team overview

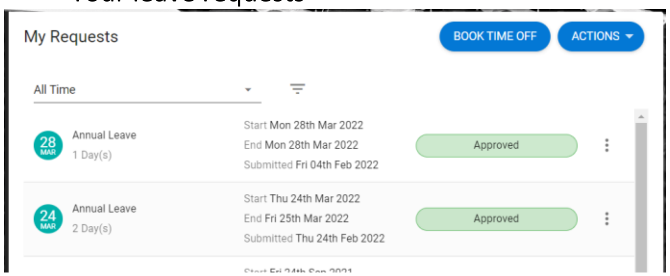


1.c Delegation options



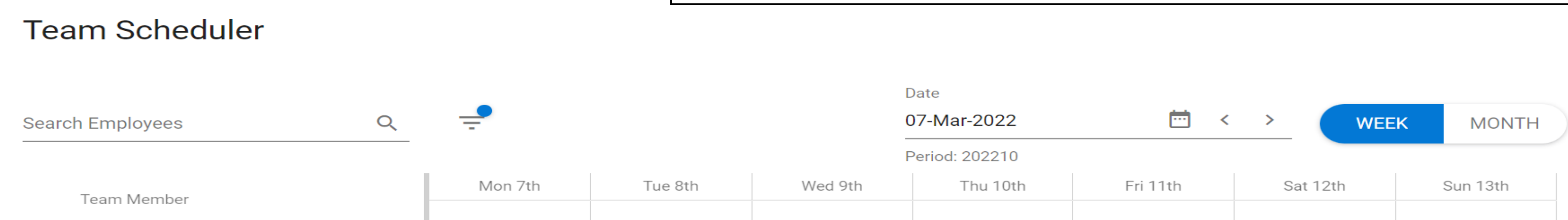
2. Employee Dashboard

Your leave requests

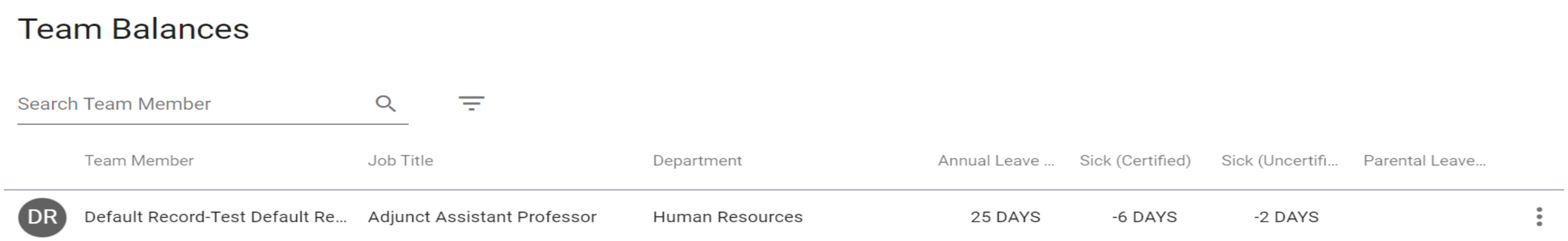


3. Workforce Management

3.a Team Scheduler



3.b Team Balances



Note: Items listed on the *Overview of Dashboards available to Managers* and mentioned in the *Quick Guide* below are marked with hash symbol (#)

Quick ELeave guide for Managers

How to access Core Portal:

➔ Go to TCD.ie/hr webpage

➔ Click Link to Core Portal

Tip: You can add Core Portal to your favourite websites/bookmarks in your browser. Then you will have instant access just one click away!

How to approve leave

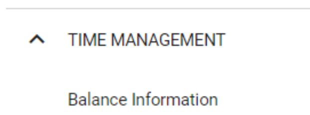
- Go to Manager Dashboard in Core Portal **#1***
- Go to MyApprovals (**#1.a**)
- Select request to review
- Click **Reject** or **Approve**
- Note: if rejecting, you must give reason

How to delegate approving leave

- Go to Delegation widget (**#1.c**)
- 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

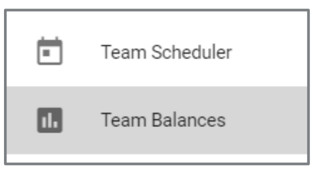
How to view employee's balance

MyTeam (#1.b)
Manager Dashboard



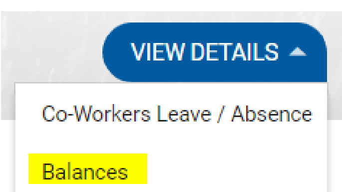
- Go to Manager Dashboard **(#1)**
- In My Team widget select employee
- Click Menu button
- Select **View Profile**
- Go to *Time Management*
- Select **Balance Information**

Team Balances (#4.b)
Workforce Management



- Go to Workforce Management **(#3)** dashboard
- Select **Team Balances** tab
- Balance summary for all your employees will show
- To see details, click Menu button
- Select **Balance Information**

When approving **leave request (#1.a)**
Manager Dashboard

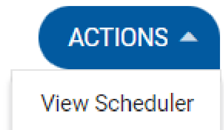


If you have a pending leave request:

- Go to Manager Dashboard **(#1)**
- Go to *Approvals*
- Click **View Details** button in top right corner
- Select **Balances**
- Click **View** button for the balance you wish to see

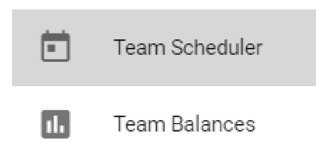
How to access Team Scheduler

MyTeam (#1.b) – Manager Dashboard



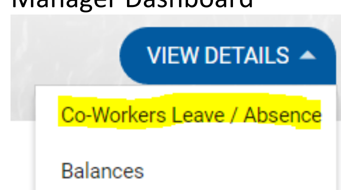
- Go to Manager Dashboard (**#1**)
- In *My Team* widget click **Actions** button
- Select **View Scheduler**

Team Scheduler (#3.a)
Workforce Management



- Go to Workforce Management dashboard (**#3**)
- Select **Team Scheduler** tab

When approving **leave request (#1.a)**
Manager Dashboard



If you have a pending leave request:

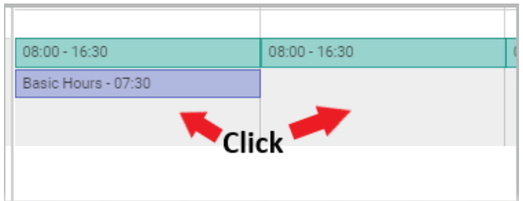
- Go to Manager Dashboard (**#1**)
- Go to *Approvals*
- Click **View Details** button in top right corner
- Select **Co-Workers Leave/Absence**

* Notes with hash symbol (#) refer to relevant points on the *Overview of Dashboards available to Managers* page

Quick ELeave guide for Managers

How to access actions in Scheduler?

Click on empty space underneath work pattern

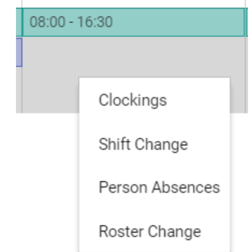


What can I do in Scheduler (#3.a)?

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.



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

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

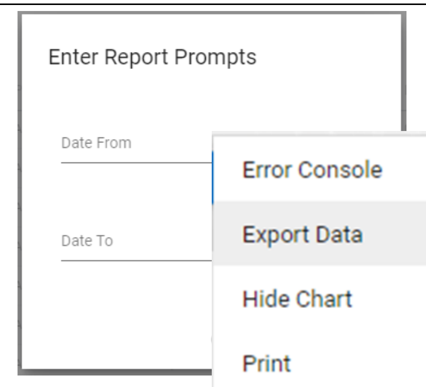
How to Edit absence?

➔ 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**

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
- Export data and save file



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