CorePortal Absence Module

User Guide for Managers

Contents

Overview ................................................................................................................................. 2
Manager Dashboard ............................................................................................................... 2
My Team ................................................................................................................................. 4
   Employee Menu .................................................................................................................. 5
   Actions button .................................................................................................................... 6
My Approvals Notifications ................................................................................................. 7
   Responding to Leave Request ............................................................................................ 8
Delegation ................................................................................................................................ 10
   Delegating your team ........................................................................................................ 10
   Delegation your employee’s team ....................................................................................... 12
Overview

The purpose of this document is to provide Line Managers and Leave approvers with an overview of the *Electronic Recording of Leave (EROL)* module in Core Portal.

EROL allows Line Managers and Leave Approvers to respond to leave requests and manage absences of their staff in the following views:

- **Manager Dashboard** – view team member’s personal and contract details, approve or reject leave requests and delegate leave responsibilities to another person.

- **Workforce Management** – view leave balances for the whole team or individual members, access Team Scheduler where absences can be put in by the manager.

- **Insight** – tool allowing manager report on leave details of their employees.

Manager Dashboard should be the default screen for Line Managers and Leave Approvers to land in after logging into CorePortal. To access any of the other views click on the menu in the top-right corner or search for it in the Search bar at the centre-top of the screen.

Manager Dashboard

When in Manager Dashboard view, from the menu on the left-hand side select *Leave Management* screen:
Within Leave Management screen there are 3 widgets:

- **My Team** – access to individual team member’s details, and if they have staff reporting to them – to view their team and delegate access to it for leave purposes.

- **My Approval Notifications** – quick overview of received leave approval requests and access to the history of your approvals.
• **Delegation** – option to delegate the responsibility of managing leave for your team to another Line Manager or Leave Approver

My Team
This window allows the manager to see the list of staff reporting to them. This list is based on work group settings, so line managers set as work group owners will see staff assigned to their work groups as members.
Employee Menu

There are following options under dots sign :

- View Team
- View Profile
- Delegate Access

*View Team* and *Delegate Access* options may be useful if the selected staff member is a manager. Otherwise, *View Profile* will be most in use.

**View Team**

Under *View Team* you can see a list of direct reports of the staff member that you are looking up:

![Manager Dashboard](image)

**View Profile**

*View Profile* provides an overview of personal information of the selected staff member, their contract status, and also their leave and attendance details:
Delegate access

If the selected staff member is a Line Manager themselves, *Delegate Access* option will allow you to refer their Leave Approver responsibilities to another approver.

For more information on delegation options go to **Delegation** section.

**Actions button**

Under *Actions* button you find a shortcut to the **Team Scheduler** that can also be accessed through **Workforce Management view.**
Team Scheduler allows the Manager or Leave Approver to make changes to work patterns and add absences to the employee’s record. With left button of your mouse click on the blank space below working hours to show available options:

- Clockings – N/A
- Shift Change – change of the weekly pattern of working hours (effective with future date)
- Person Absences – option for manager to record an absence on the employee’s record
- Roster Change – once-off change to the roster, not affecting any other date than the one selected

My Approvals Notifications

[Image of a notification screen]
*My Approvals Notifications* displays new approval requests that have not yet been actioned by the manager.

To respond to received request, click either **APPROVALS** or **VIEW**. Both buttons will bring you to the Approval page, although clicking on View will bring you directly to that specific request, whereas Approvals go to the top of the list by default.

**Responding to Leave Request**

1. Click on the request you want to action on.
2. Review details – what type of leave request it is, what are the dates, are there any comments?

Note: employees can only submit requests for the following types of leave:

- Annual Leave
- Sick Leave (certified or Uncertified)
- Exam Leave
- Academic Leave of Absence

3. In the bottom right corner of the screen you will see **Reject** and **Approve** buttons:

   a. If you are happy with the leave request to be approved, just click **APPROVE**. The staff member should get a notification and an email confirming that their request was approved.
b. If there are reasons for the manager to reject the request, after clicking REJECT button, there will be a pop-up box asking for a comment. This comment will be included in the notification and email sent to the staff member informing them of the rejection.

Comment is mandatory and leaving it blank will result in an error message:

If the system accepted response, a confirmation will show up in the top-right corner:

Once a request is Approved or Rejected, it automatically goes off the list of approvals.

The history of requests actioned previously can be found under Actions Menu:
Delegation

In EROL module responsibilities to manage leave requests can be delegated to another staff member with Leave Approver permissions. There are two types of delegation:

- **Delegating your own team** – when you want another Leave Approver to take over from you, and
- **Delegating your employee’s team** – when you want another person to manage leave of the team assigned to your employee.

**Delegating your team**

By adding delegation within *Delegation* window, you are referring all staff reporting to you to another Leave Approver.

**Note:** If you manage more than one team (own more than one work group), you will be delegating all your teams.

1. To delegate to another person, click the **ADD DELEGATION** button.
2. It will bring you over to the next screen where you need to provide details of the person you want to delegate to.
• **Type** – select *Org Role* as currently it is the only available option

• **From Date** – select the date for the delegation to take effect from

3. Once you select *Type* and *From Date*, available org role types will appear. Click on the *Leave Approver* one:
**Note:** Leave Approver Org Role needs to be clicked on (selected/highlighted), otherwise saving delegation details will return an error.

- **Delegate to** – list of names available to select. This list will show only after **Type** and **From Date** are selected. Search for the appropriate name and select it
- **To Date** – if the delegation is only temporary, select the date when the person you are delegating to should lose access to your team’s leave details
- **Reason** – provide reason for this delegation (e.g., annual leave)

4. Confirm delegation by ticking the box:

   ![Checkbox](image)

5. Click Save button in the bottom-right corner.

### Delegation your employee’s team

This option is available within My Team window. To delegate one of your employee’s team to another Leave Approver, you need to:

1. Go to My Team and click by the name of the employee that manages the team you wish to delegate
2. Select **Delegate Access** option.
3. Click the button.
4. On the next screen select the new approver from the **Delegate To** list and **From Date**:

![Delegate Delegation Form](image)
5. Org roles selection should appear, so click on Leave Approver:

![Org Role Selection Table]

6. Fill in other details if appropriate and confirm delegation by ticking the box:

![Check Box]

7. Click Save button in the bottom-right corner.