# CorePortal Absence Module

## User Guide for Managers

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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 CorePortal. Link to CorePortal can be found on the HR webpage at tcd.ie/hr:

Direct link to CorePortal can also be added to your browser’s bookmarks to allow you quick access whenever you need it.

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-left corner or search for it in the Search bar at the centre-top of the screen.
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 Approvals Notifications** – quick overview of received leave approval requests and access to the history of your approvals

![My Approvals Notifications](image1)

• **Delegation** – option to delegate the responsibility of managing leave for your team to another Line Manager or Leave Approver

![Delegation](image2)
**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:
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:

- EMPLOYEE DETAIL
- CONTRACT
- TIME MANAGEMENT
  - Balance Information
  - Attendance Details
  - Leave Requests
- LEARNING AND DEVELOPMENT

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* can also be accessed through Workforce Management section. 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

For more on these functions, go to Team Scheduler section under Workforce Management chapter of this user guide.
**My Approvals Notifications**

*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 the 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 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:

```
I authorise this individual to approve on my behalf
```

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:

5. Org roles selection should appear, so click on Leave Approver:

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

7. Click Save button in the bottom-right corner.
If you expand the menu on the left-hand side, you will see the following options:

**Team Scheduler**

**Team Scheduler** allows you to view absences, requests, and work patterns of your staff. In this screen you will be able to add and edit absences, make upcoming changes to work schedules or make once off changes to work patterns of your employees.

*Actions available on the Scheduler*

After clicking on the blank space underneath employee’s work details for the day and you will see available options:

- **Clockings** – Not applicable, as there is no clocking system set up yet.
- **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.

**Navigating the scheduler**

**Pages**
Scheduler allows you to see up to 10 employees on one page, so if you have more staff reporting to you, you may need to move between pages of your list with arrows in the bottom right corner of the screen:

<  >

**Filters**
Search and filtering options allow you to narrow down your list, if needed.

If you are set up as a line manager (work group owner) of more than one work group, you can select one of them to narrow down the list to just that specific group by clicking on the small triangle arrow:
Other buttons allow you to decide what you are interested in seeing in the calendar.

- **Absences** – any type of absence recorded for this staff member
- **Attendance** – what the system recognised as attendance based on rostered hours and clockings. As there are no clocking implemented to the system, this function may not be needed here.
- **Clockings** – currently not in use
- **Leave requests** – requests for leave submitted by employees
- **Roster** – expected shift type and work pattern set for an employee
Changing Shift and Roster

In some circumstances employees may require either occasional changes to their roster, or they change their working hours on ongoing basis, they may need either Roster Change or Shift Change.

Shift Change
To change a Shift type for an employee, follow these steps:

1. Click on the blank space underneath the selected employee’s work pattern details and select Shift Change option.

2. You will be brought over to a new screen that shows your employee details as well as a table showing their Shift type details:
   - Shift – code for the shift type in use
   - Date Effective – what date that shift type is effective from
   - Cycle Start Seq. – if an employee works in weekly cycles, it is possible to set a few shift types into a cycle.

3. To add a new Shift type click button on the right-hand side. A new line will appear that you need to fill in.

4. Click on the dropdown list under Shift and select the one you need:
5. You can click on this button and select View Shift Cycles to see details of work patterns for the selected shift:

6. Then click on the calendar under Date Effective and pick the date for this roster to take effect from. Note that the system will only allow to assign new shift with future dates.

7. If there is no weekly cycle, under Cycle Start Seq, just type in 1. For cycled shifts you would need to apply consecutive numbering of shift sequence.

8. Once all details are in, click button in the bottom-right corner. If all went well, you should see a message confirming change saved successfully:

   Details Updated Successfully

If you click on button, you will see current shift and work pattern set up week by week:
Roster change

If in a particular week your employee worked a different pattern than normal, you can make changes to their roster.

1. In the Roster Change page select an employee you want to make updates for, and also pick relevant week affected by this change.

2. Click on dates you want to change so there is a small “tick” sign displayed:

3. Under Requested Work Pattern find the one you need:
4. Once you select the pattern you need, the system will automatically update the dates you picked with new pattern. You will see a box confirming this and that the dates you picked are now updated:

5. Now you can click and return to the Scheduler.

**Recording an Absence**

There may be situations, when the Line Manager will be required to add an absence for an employee. It may be a case for unexpected absences, or types of absences that can only be recorded by the manager or leave approver (e.g. Pre/Ante-Natal, or Study Leave).

When in the **Scheduler**, click on the blank space underneath roster details for the staff member you wish to add absence for (or update existing one) and click on **Person Absence** option. You will
be brought over to the screen listing all current absences for them. Details include start and end date of the absence, duration in days/hours/weeks and other details.

Depending on what you need to do, there are two options:

➢ To view details or edit existing Absence, click three dots button and select View/Edit Absence Details:

![](image)

**Note:** for editing absences that are in the future, you can also click on that absence’s box on the Scheduler screen, and it will bring you straight over to editing absence screen.

➢ To add new absence, click the button in the top right corner of your screen.

The steps are similar for adding new absence or editing an existing absence.

There are 5 steps of adding an absence, but some of them may be skipped, such as *Return to Work Interview* (relevant to returning from long term illnesses) and *Supporting Documents* (functionality not available due to existing limitations of the system).

1. Complete Absence Details (Step 1.)
2. Select Leave Type from the drop-down list, e.g. Sick (Uncertified), or Pre/Anite-Natal Leave:

![Leave Type dropdown list](image)

3. Then select dates for the leave. If it is one day leave, select same date for both Start and End Date

![Date selection](image)

4. In most cases, except “Sick (Certified)”, once you put in these details, you can click the green button and the absence will be added successfully.

![Absence added successfully](image)

5. For “Sick (Certified)” type of leave, you will be asked to fill in a Reason under More (Step 2.)

![Reason selection](image)
Select applicable pay rate – you may go to *Balances* (Step 5.) to see days used up to date to determine which option should apply. If needed, refer to the *Sick Leave Policy*.

More detailed options include:

- Part Day Leave
- Open Ended absence
- Enter Duration
- Recurring absences

➢ For **Part Day Leave** absence, you need to add information on the *Segments* (system is mostly set up to recognise full day of ½ day requests), and *Time of Day*.

![Absence Detail](image)

➢ You may use **Open Ended** option for leave that you have a start date, but no end date for.

![Absence Detail](image)
➢ **Enter Duration** can be applicable for leave with particular number of days. The system will recognise normal rest days, such as weekends, so the number of days provided under duration should include only working days.

![Absence Detail](image)

➢ Regularly occurring absence can also be recorded under **Recurrence** option:

![Absence Detail](image)
### Leave Types

Overview of Leave Types currently on the system and who can record them:

<table>
<thead>
<tr>
<th>Leave Type</th>
<th>Employee</th>
<th>Manager</th>
<th>HR Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Leave</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Sick (Certified)</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Sick (Uncertified)</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Exam Leave</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Flexi Leave</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Leave of Absence - Academic</td>
<td>✓</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Pre-/Ante-Natal Leave</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Public Holiday</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Special Leave (Compassionate)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Special Leave (Dáil Éireann)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Special Leave (Defence Forces - unpaid)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Special Leave (Defence Forces)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Special Leave (Jury)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Study Leave (Paid)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Study Leave (Unpaid)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Trade Union Duties (Paid)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Trade Union Duties (Unpaid)</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Training Leave</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Unapproved Absence</td>
<td>X</td>
<td>✓</td>
<td>n/a</td>
</tr>
<tr>
<td>Adoptive Leave (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Adoptive Leave (Unpaid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Career Break</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Carer Leave</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>CV-19 Special Leave (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Force Majeure Leave</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Maternity Leave (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Maternity Leave (Unpaid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Parental Leave (Child 1)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Parental Leave (Child 2)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Parental Leave (Child 3)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Parents Leave</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Paternity Leave (Unpaid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Paternity Paid (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Pregnancy Sick Leave (Certified)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Secondment (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Secondment (Unpaid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Shorter Working Year Scheme</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Sick (Critical Illness)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Off Duty (Paid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>Off Duty (Unpaid)</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
<tr>
<td>TRR</td>
<td>X</td>
<td>X</td>
<td>✓</td>
</tr>
</tbody>
</table>
Team balances
On the main screen of Team Balances, you can see the summary of your employees’ leave operating in balances:

- Annual Leave
- Sick (Certified)
- Sick (Uncertified), and
- Parental

If you have many employees reporting to you, you can search for individuals by name, or narrow down the list by using a work group filter (if you are set as line manager for more than one work group)

Balance information
To see more details on an employee’s leave, click on the three dots button and select Balance Information:
On the Balance Information screen, you will see balances currently active for your staff member, with details of entitlements, carried over values, days deducted for Christmas Closure and days taken off to date. Just click on the balance you want to look into, and details will show under Transactions:

<table>
<thead>
<tr>
<th>Balance for Employee</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Active</strong></td>
</tr>
<tr>
<td>Annual Leave Full Time (Pre 2014)</td>
</tr>
<tr>
<td>Sick (Certified)</td>
</tr>
<tr>
<td>Sick (Uncertified)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transactions for Sick (Uncertified)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Date</strong></td>
</tr>
<tr>
<td>12-Dec-2019</td>
</tr>
<tr>
<td>13-Aug-2021</td>
</tr>
<tr>
<td>29-Nov-2021</td>
</tr>
</tbody>
</table>

***

That is all we have prepared for you as the Line Manager or Leave approver. 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. We will be happy to hear your feedback and suggestions.

Enjoy!