CoreTime Approver Training
New Look and Features

Old Look

New Look - New screens and features
Main points

- There are now two areas within the portal to view and approve staff requests.

1. Manager Dashboard – approval of requests from the employee via the Portal.

2. Workforce Management Dashboard – to view or amend requests for employees.
Manager Dashboard

- There are 2 areas within the Manager Dashboard:
  - My Approvals
  - Notifications

- ‘My Approvals’ can be accessed by clicking on the ‘Approvals’ tab or ‘View’ the individual request.
My Approvals

The screen displays as:

You will be given the option to Approve or Reject the requests.
My Approvals

— My Approvals displays the Actions that are outstanding for you.
— My Approvals screen allows you to Approve or Reject:
  1. Leave Requests.
  2. Missed Clocking Requests.
  3. Course Requests.
— Actions continue to appear on this screen until they have been fully completed.
My Approvals

- If required before you approve or reject you have an option to view the employee’s Co-Workers Leave/Absence, employee’s Balances and View Narratives.

- Final step is Approve or Reject leave on the bottom right of the screen.
Notifications

—Notification Centre displays as:
Notifications

— Within this tab:

1. The counter shows the number of unread notifications.
2. Alerts are displayed in descending order, based on the date generated i.e. most recent first.
3. There are various symbols highlighting the types of alerts for example, unread, actions items & updates.
Workforce Management

— In additional to the Manager Dashboard there is a new dashboard called ‘Workforce Management’
— Within this area is a number of functions:
  1. Team Scheduler (previously called ‘record absence details’).
  2. Team Balances
Team Scheduler - functions

The 3 main functions within the Team Scheduler are:

— Person Absences – view or amend absences.
— Maintain Hours – manage clockings.
— Clockings – amend or add clockings.
Team Scheduler – Change requests

To amend a leave request through the Team scheduler.

1. Find and click on the leave request.
2. This brings you to ‘Absence details’ screen.
3. Within this tab you can amend the dates, change the leave type i.e. annual leave to certified sick leave.
4. Change full day to a half.
Team Scheduler – Add or Delete a request

To add, delete, view/edit an existing absence for the employee:

1. Workforce Manager Dashboard then Team Scheduler.
2. Click on the applicable employee day.
3. Select Person Absences
Team Scheduler – Clockings

- Here you can manually add or amend clockings.
- To add or amend a clocking select team member and scroll to the date.
- Click a blank space on the date and select **Clockings**.
Team Scheduler – Maintain Hours

- **Maintain Hours** is another area to manage clockings.
- In this area you can enter clockings and **calculate** the hours for the week in questions.
Workforce Management – Team Balances

Team Balances displays as:
Workforce Management – Team Balances

-Balance information and adjustments are available within this area.

<table>
<thead>
<tr>
<th>Team Member</th>
<th>Job Title</th>
<th>Department</th>
<th>Annual Le...</th>
<th>Flexi</th>
<th>183 Days</th>
<th>92 Days</th>
<th>7 Days</th>
<th>Balance Information</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Thank you

— Refer to the HR website for manuals.
— Contact coretime@dcu.ie