



CoreTime Approver Manual 2021

DCU HR System Team
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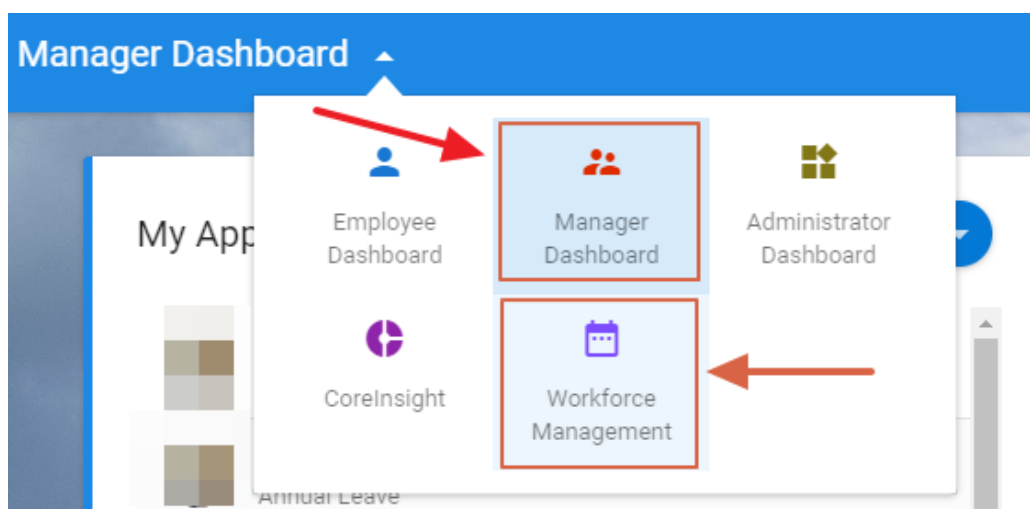
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OVERVIEW

COREHR PORTAL

There are now two areas within the portal to view, approve/reject and amend staff requests.

1. **Manager Dashboard** – approve/reject requests from the employee via the Portal.
2. **Workforce Management Dashboard** – to view or amend requests for employees.



MANAGER DASHBOARD

There are two areas within the Manager Dashboard:

- My Approvals
- Notifications

WORKFORCE MANAGEMENT

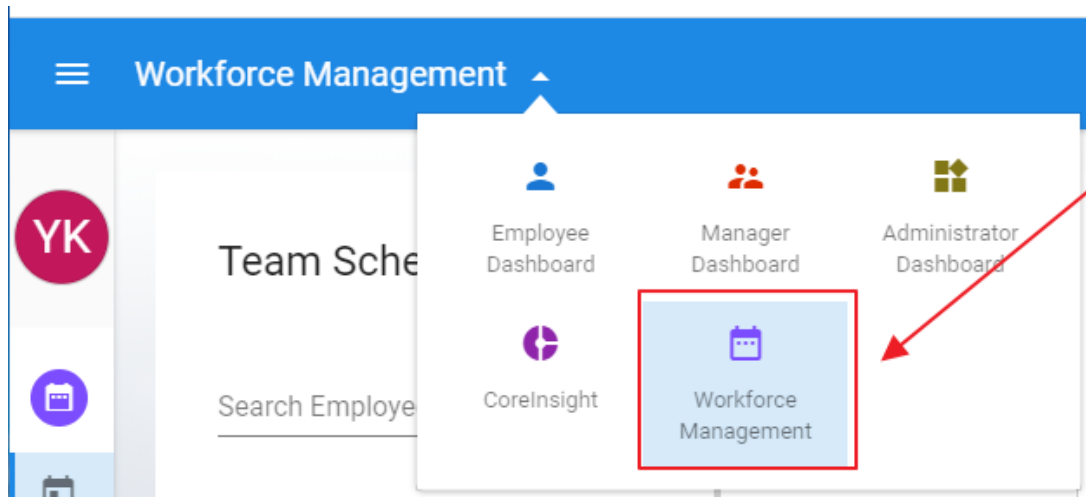
There are two areas within Workforce Management Dashboard:

- Team Scheduler (previously called 'record absence details').
- Team Balances

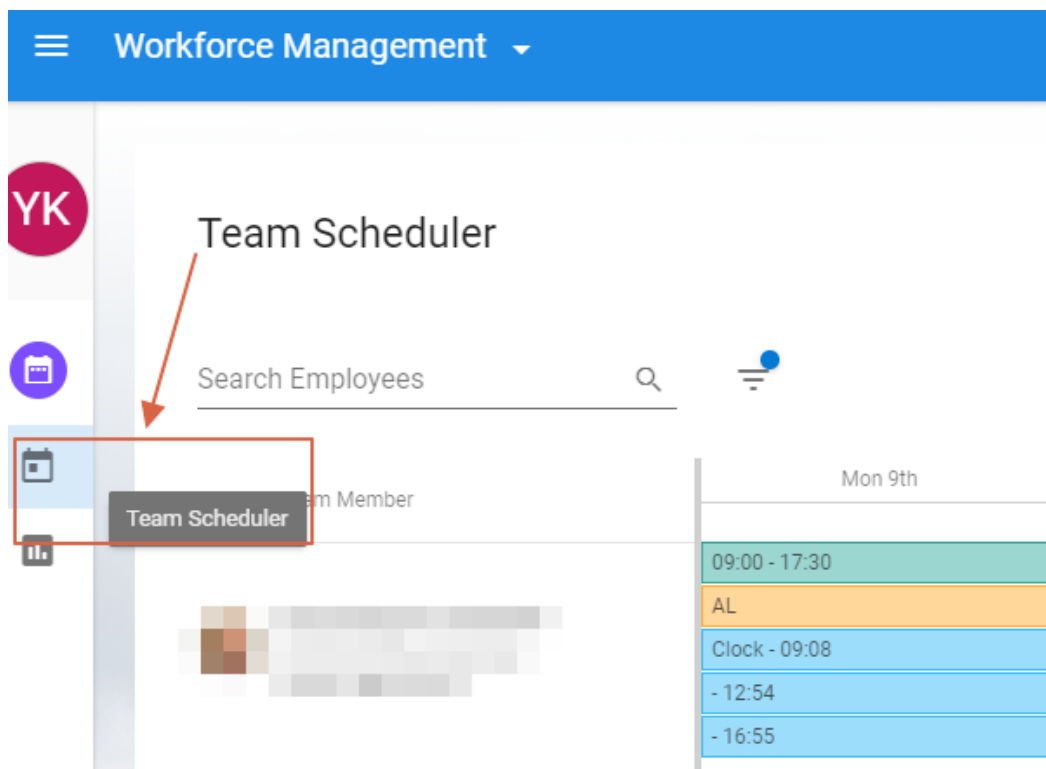
MANAGING LEAVE REQUESTS

VIEW YOUR STAFF LEAVE CALENDAR ON COREPORTAL

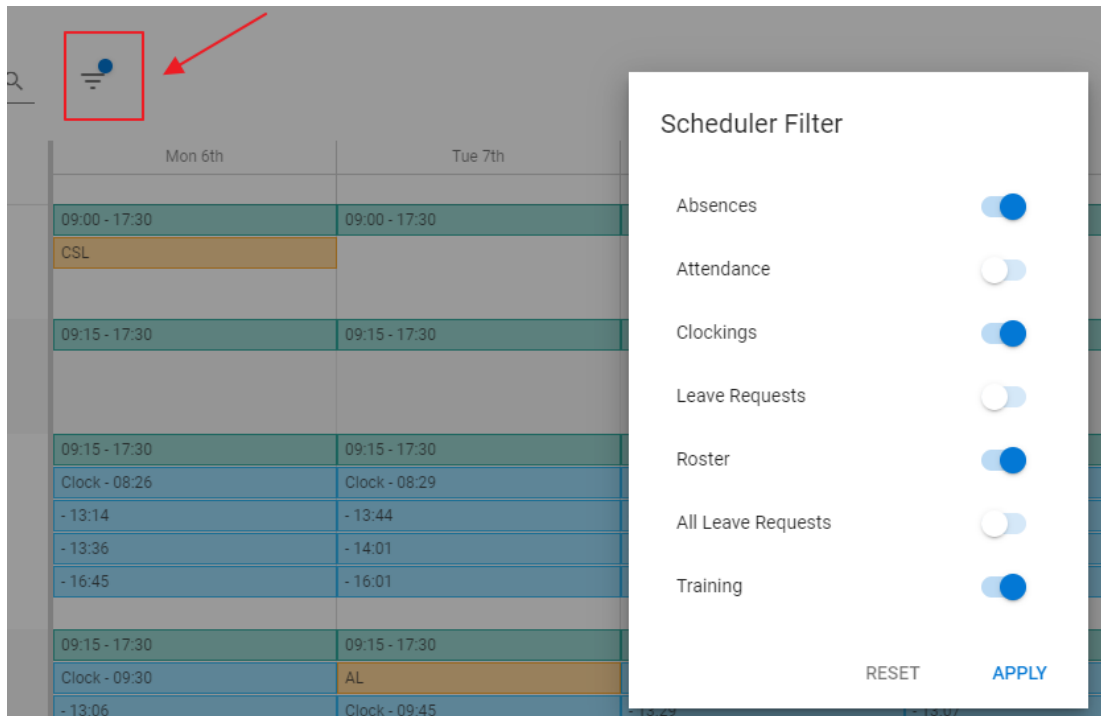
1. Go to your **'Workforce Management' Dashboard** and select **My Team**.



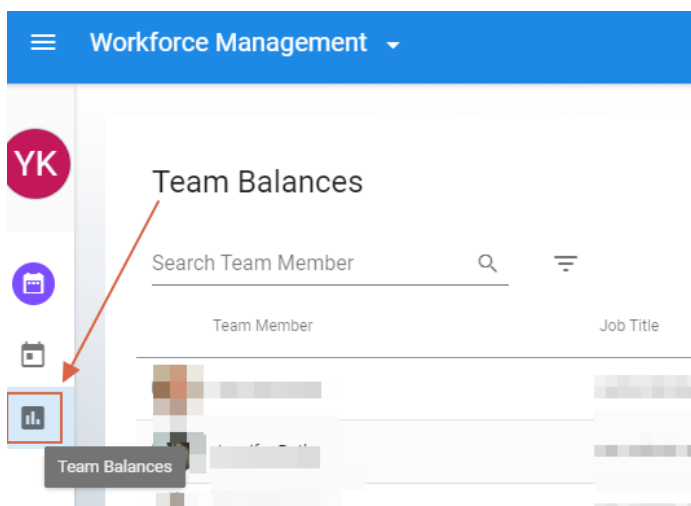
2. The system shows the **Scheduler** by default. Here you can view at a glance who is taking annual or other leave on a week-by-week basis



You can also use the **Filter button (3 lines)** to show clockings (if used) or absences only. Click on the filter and choose the options you wish i.e. clockings, absences and so on.



You click the **'Team Balances'** button on the left hand column to view the annual leave balances of everyone in the work group(s) you have access to.



APPROVE/REJECT AN ANNUAL LEAVE REQUEST SUBMITTED VIA COREPORTAL

Scenario: Let's say you've received an email notifying you that a member of your team has requested annual leave:

YVONNE O'ROURKE has submitted the following leave request:

Leave Type: ANNUAL LEAVE

Start Date: 29-MAY-19

End Date: 30-MAY-19

Please NOTE that this could be a part day leave.

Please login to Core HR Portal, and you will see the request under 'My Approvals'. Please either Approve or Reject this request.

https://my.corehr.com/pls/coreportal_dcup/cp_por_public_main_page.display_login_page

Please do not reply to this system generated email.

1. You click the link within the email and login to your CorePortal using your AD username and password.
2. Your approvals are displayed as either a list of people in date requested order under your **Approvals** tab or as a **Notification** (red number beside a small flag on the top of the screen).
3. The **My Approvals** Notifications section displays the Actions that are outstanding for you. This does not include Updates. This section provides a clear view of the number of outstanding Action items awaiting completion of approval in your queue.

For detailed overviews of each, view the sections outlined below:

- My Approvals Notifications Overview
- Notification Centre Overview

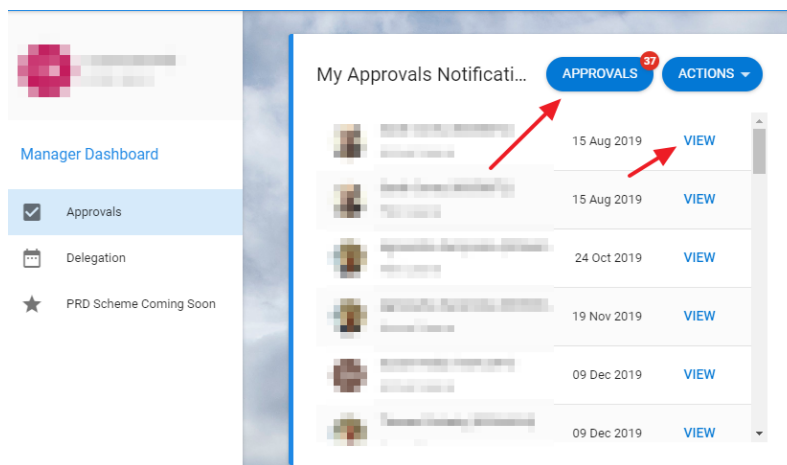
1. MY APPROVALS

2. **My Approvals Screen** - Approving / Rejecting Leave Requests

It is possible to Approve and/or Reject Leave Requests via the My Approvals screen. This screen is accessible from the Notification – Actions, and the My Approvals Notifications section.

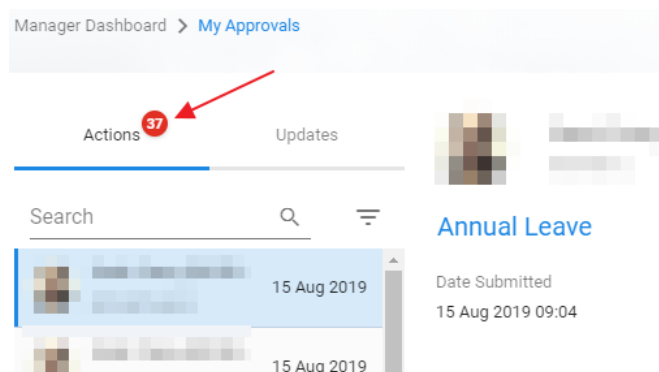
3. **Actions** continue to appear on this screen until they have been fully completed. For example, Approved and/or Rejected.

- Click the **Approvals** button to jump straight to the **My Approvals** screen, to view the full list of *Action* items. The counter on this button reflects the number of open action items, both read and unread.
- Click the **View** button on an applicable *Action* to open the *My Approvals* screen on that item, this allows you to complete the required actions. For example, **Approve** and/or **Reject**.



4. To Approve or Reject a Leave Request, on the My Approvals screen:

- Click on the **Approvals** Tab in the **My Approval Notifications**
- Click the **Actions** tab.





- iii. Select the applicable Leave Request. Details for the Annual Leave request are displayed on screen for review.

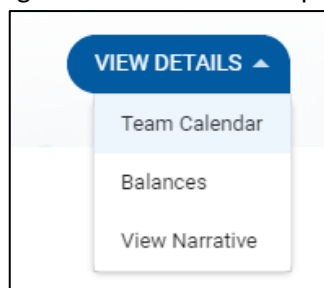
The screenshot shows the 'Manager Dashboard' with a 'My Approvals' section. Under 'Actions' (37), a list of requests is shown. The selected request is for 'Annual Leave' submitted on 15 Aug 2019. Details include: Date Submitted: 15 Aug 2019 09:04, Leave Type: Annual Leave, Duration: 1 Day(s), Date From: Thursday, 12 Sep 2019. A confirmation checkbox is at the bottom.

Search	Updates
15 Aug 2019	Date Submitted: 15 Aug 2019 09:04
15 Aug 2019	Leave Type: Annual Leave
24 Oct 2019	Duration: 1 Day(s)
19 Nov 2019	Date From: Thursday, 12 Sep 2019
09 Dec 2019	

To read and review the terms and conditions for approval, please click [here](#)

☐ I confirm that the above details are correct

- iv. If required before you approve or reject you have options to access the Team Calendar, access the employee's annual leave Balances and View Narratives that the employee may have entered when making the request. This is located on the top right hand screen of a request.



- v. The **Team Calendar** option allows you to view who else has requested or has been granted leave during the same period.

The screenshot shows the 'Team Calendar' view with a toggle for 'Absences Only'. The calendar displays a grid for Monday 17th and Tuesday 18th. The grid shows various leave requests and balances for different employees.

Name	Mon 17th	Tue 18th
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ
	Annual Leave 3.36 Hours (Taken)	Annual Leave 5 Days (Requested)
	09:00-17:30 - HRPROJ	Certified Sick Leave (Booked)
	09:00-17:30 - HRPROJ	09:00-17:30 - HRPROJ
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ
	09:15-17:30 - HRPROJ	09:15-17:30 - HRPROJ

- vi. Similarly, **View Balances** option allows you to check if the person has sufficient leave available for the request.

Balances	
Manager Dashboard > My Approvals > Balances	
DCU Annual Leave	26.00 days
DCU Flexitime	-5.57 hours
183 days sick leave in rolling 4 years	168.00 days
92 days sick leave in rolling 12 months	91.00 days
7 days USL rolling 24 months	7.00 days
Sick Leave Cert / Uncert 4 Years	168.00 days
Sick Leave Certified 4 Years	169.00 days
Sick Leave Uncertified 1 Year	7.00 days

- vii. Once you are happy with all the information before you approve or reject the request Tick the 'I confirm that the above details are correct' indicator.

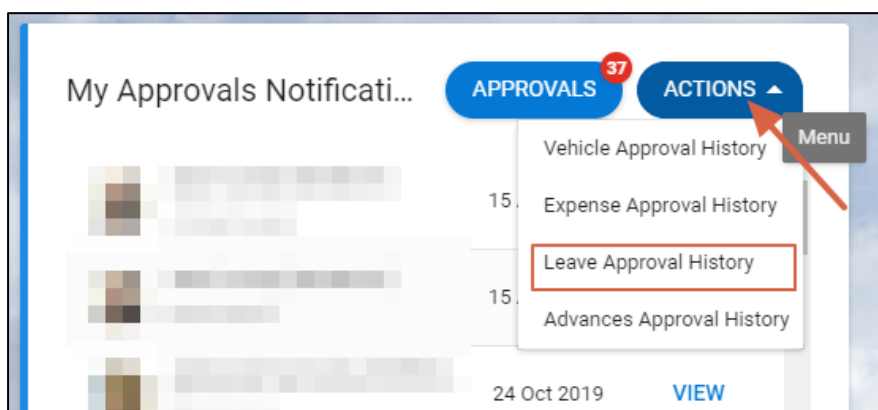
- viii. Click Approve or Reject leave on the bottom right of the screen.



- ix. When Leave Request is approved or rejected, it is removed from the Action list. The staff member is notified.

5. It is possible to view a **Leave Approval History** for items already completed. To do this:

- Click the **Actions** button.
- Select **Leave Approval History**.



The Leave Approval History screen displays.

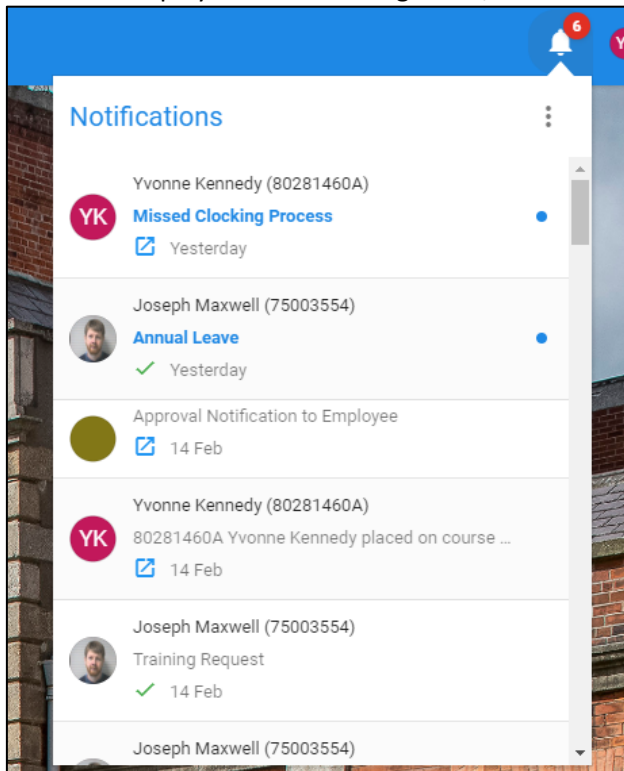
This screen lists all your historic Leave Requests Approvals, and clearly shows their status.


2. NOTIFICATIONS

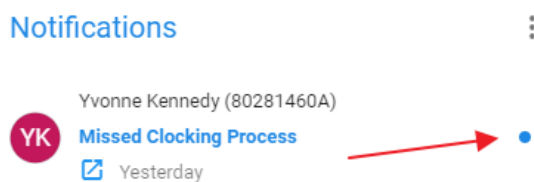
When an employee submits a *Leave Request* for approval, their applicable manager receives a *Notification*, indicating that there is an alert to be actioned.

Notifications are represented by the  bell icon:


- 1.The counter shows the number of unread notifications. For example, if there are 10 items on the list but 3 have been read, the counter will display 7.
- 2.Alerts are displayed in descending order, based on the date generated i.e. most recent first.

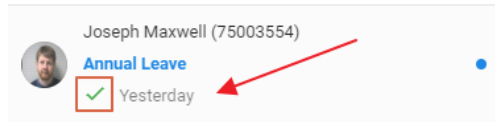


3.Unread alerts are flagged with. 

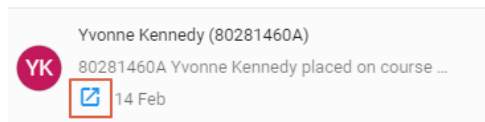




4. Action items (*Approvals*) are flagged with 

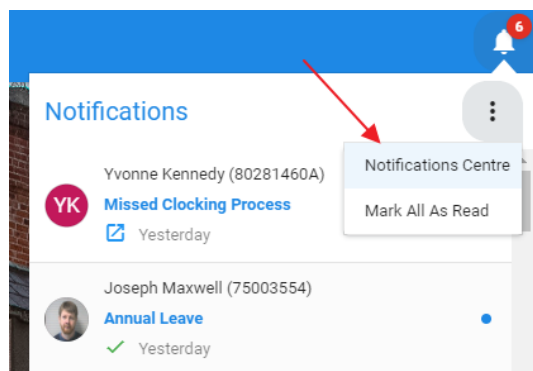


5. Update items (*Notifications*) are flagged with 



To access the *Notification Centre* screen:

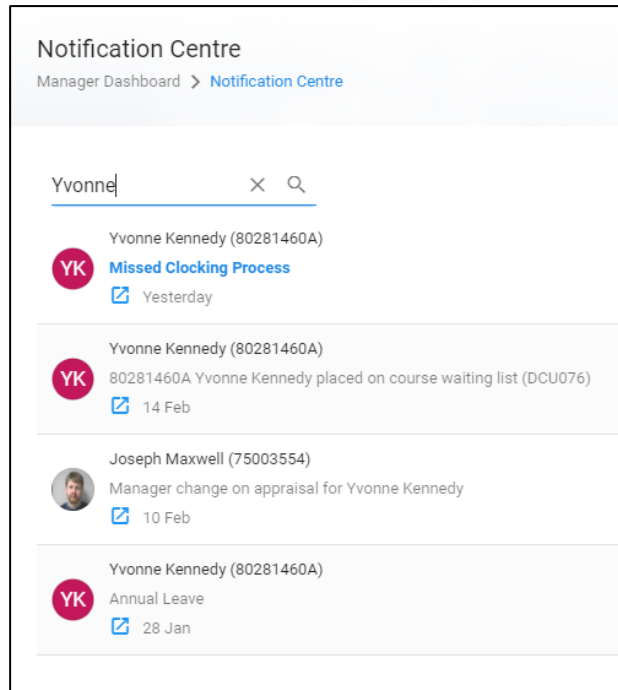
1. Click the  button.
2. Select **Notification Centre**.



The *Notification Centre* screen displays.

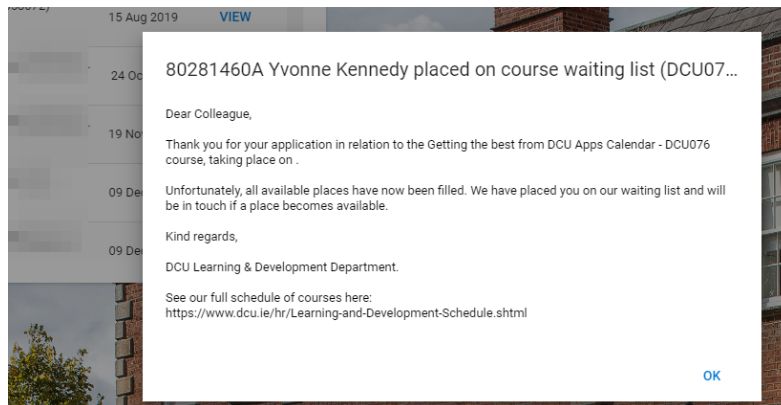
You can search the list of **Actions** and **Updates** using the search field at the top of the screen. This keyword search will return any records that match based on:


6. Name
7. Employee number
8. *Action* type, for example 'Annual Leave'
9. *Update* description, for example 'Annual Leave'



If you click on an *Update* item, the message pops up on screen, as shown in the below screenshot.

10. This is then marked as read.
11. The *Update* remains on the list for 30 days.



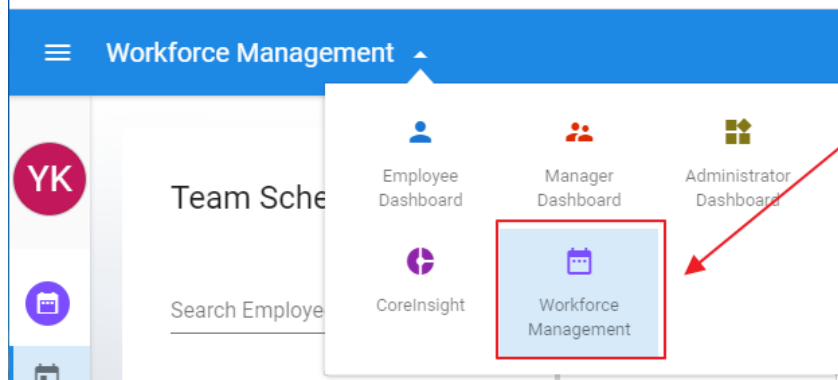
If you click on an *Action*  item, the *My Approvals* screen opens on that item, allowing you to complete the required actions. For example: **Approve** and/or **Reject**.

RECORD AN ABSENCE NOT SUBMITTED VIA COREPORTAL

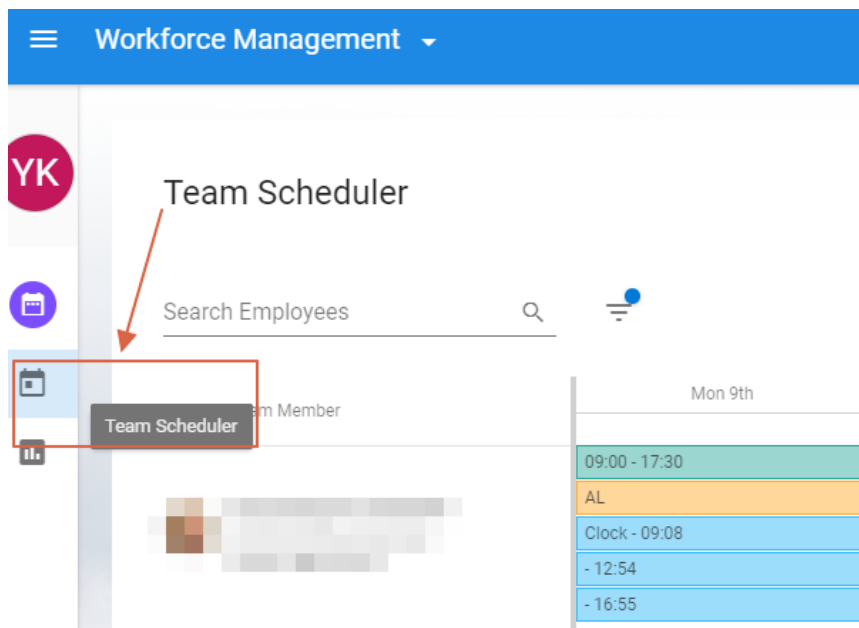
Scenario: Let's say a staff member asks to take an annual leave day but does not use CorePortal to make the request (typically late on a Friday evening!).

You agree to the request verbally but you need to record the absence in CoreTime.

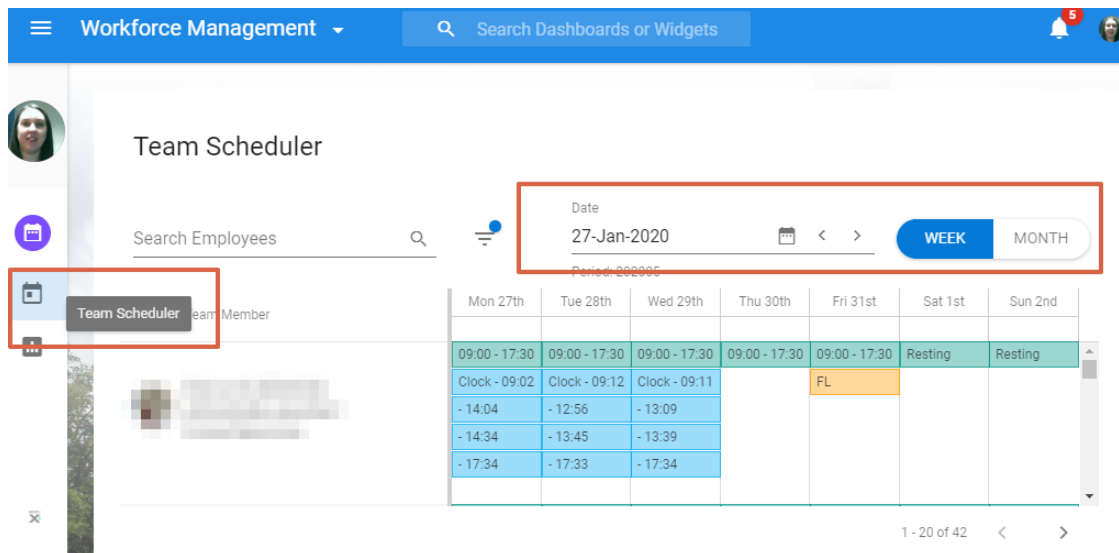
1. Go to CorePortal and access the **Workforce Management**.



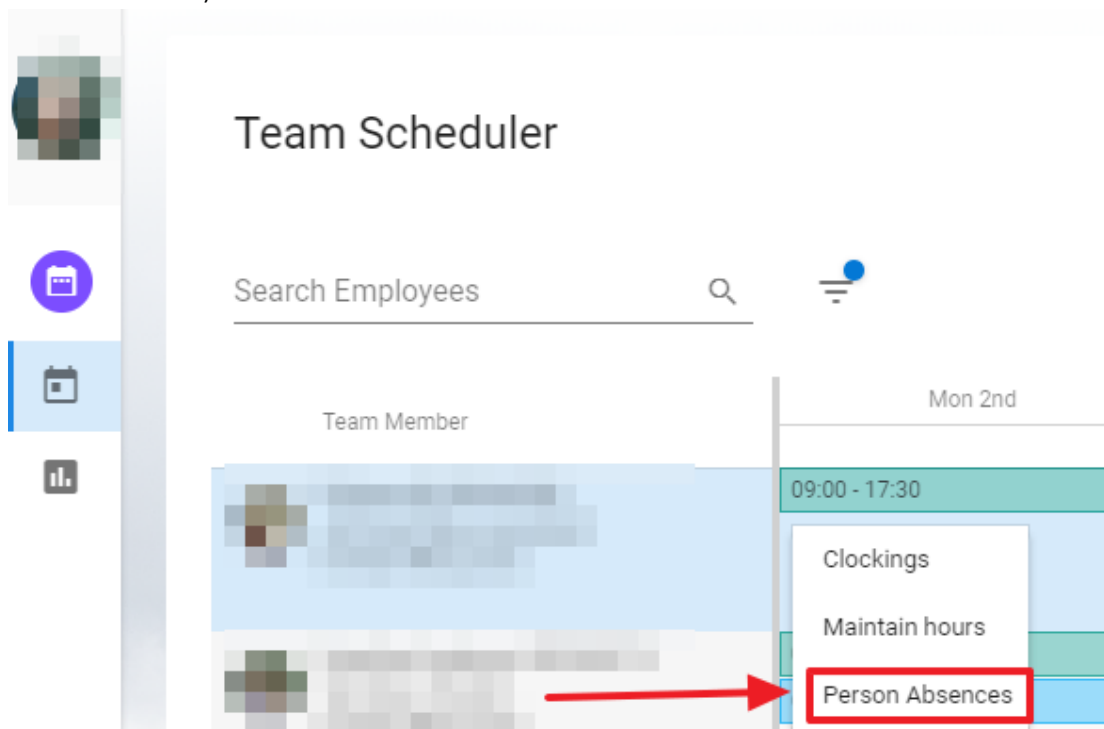
2. Select 'Team Scheduler' tab.



3. Scroll down or search for the employee that you wish to record the absence for and use the date scroller (**Previous** and **Next** buttons or enter a **Date**) to get to the week in which you wish to record the absence.



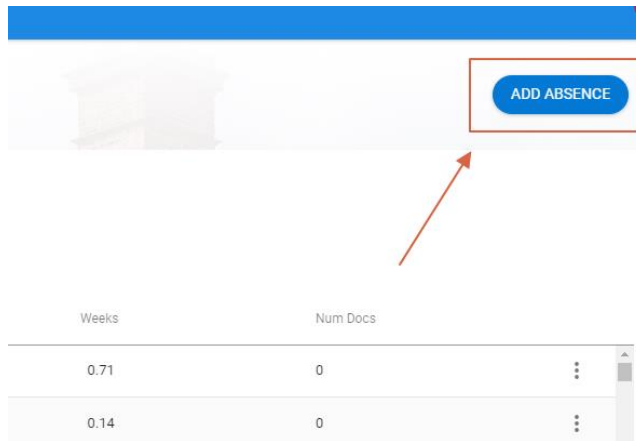
4. To select the date for which you want to record the absence, click the blank space (marked with a star on the screenshot). Select **'Person Absences'**.



5. The Person Absences screen displays. This screen lists all the employee's absences.

6. To Add New Absence To add a new absence for the employee:

1. Click Add Absence (top right hand corner of the screen).



2. The Absence Details screen displays.

Person Absences

Absence Details: [Redacted]

Workforce Management > Person Absences > [Redacted]

1 Absence Details

2 More

3 Document Uploads

4 Balances

Absence Detail

Leave Type *
Annual Leave
Select a leave type

Start Date *
03-Feb-2020
Select a start date

Part Day Leave ☒ Open Ended ☒ Enter Duration ☒

Segments
Select a segment of the day

Time of day
Select a time of day

Repeat
Select a number of weeks to repeat the absence

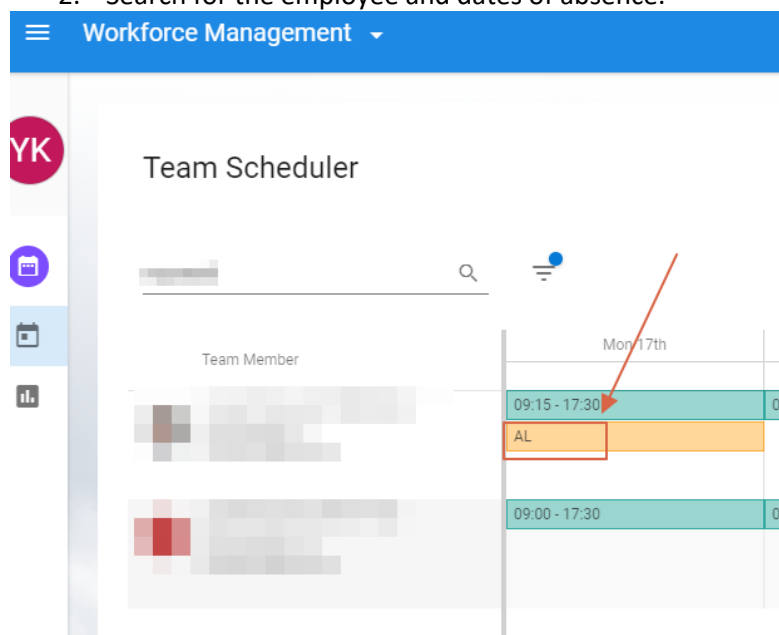
3. Select the Leave Type from the drop-down list.
4. Enter the Start Date (will default to date you selected) and End Date.
5. Specify if the absence is Part Day Leave and/or Open Ended.
6. Click **Save** and the record is updated.
7. The leave displays in the appropriate date box on the **Team Scheduler** and in the list of Absences.

CHANGE AN APPROVED LEAVE REQUEST.

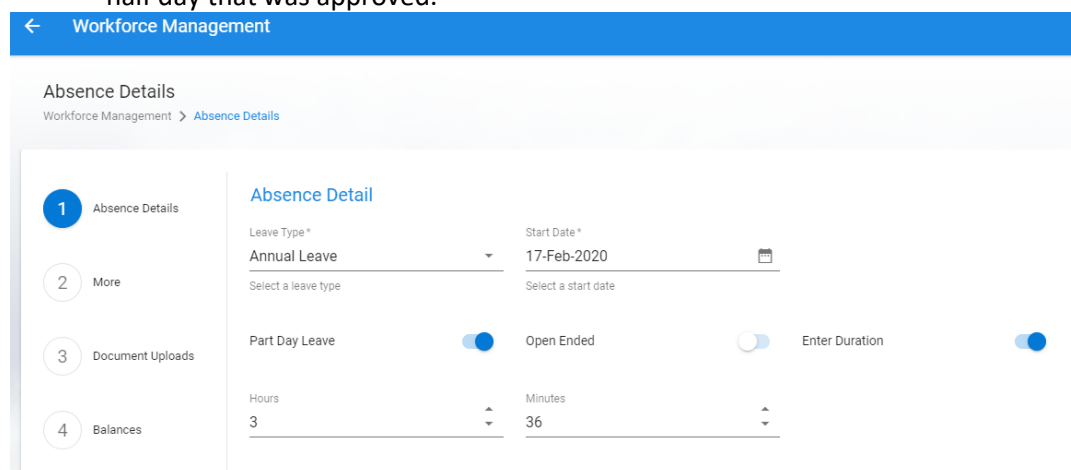
Scenario 1: Let's say an employee requested a half day annual leave and this was granted but subsequently the employee requested that the day be a full day.

1. Go to **Workforce Manager Dashboard** then **Team Scheduler**.

2. Search for the employee and dates of absence.



3. When you click the annual leave in the **Team Scheduler** a new screen appears showing the half day that was approved.



4. You can overwrite the current leave by clicking off the **Part Day Leave and Duration Indicator**.

The screenshot shows the 'Absence Detail' form. The 'Leave Type *' dropdown is set to 'Annual Leave'. The 'Start Date *' is '17-Feb-2020'. The 'Part Day Leave' toggle is turned on (blue). The 'Open Ended' toggle is turned off (grey). The 'Enter Duration' field is highlighted with a red box and contains a blue circle. Below these, the 'Hours' field is set to '3' and the 'Minutes' field is set to '36'.

5. Then Click **Save** (located at the bottom right hand corner of the screen).

Scenario 2: Let's say an employee requested an annual leave day and this now needs to be recorded as a sick leave day.

Same steps as above. However, amend the 'leave type'.

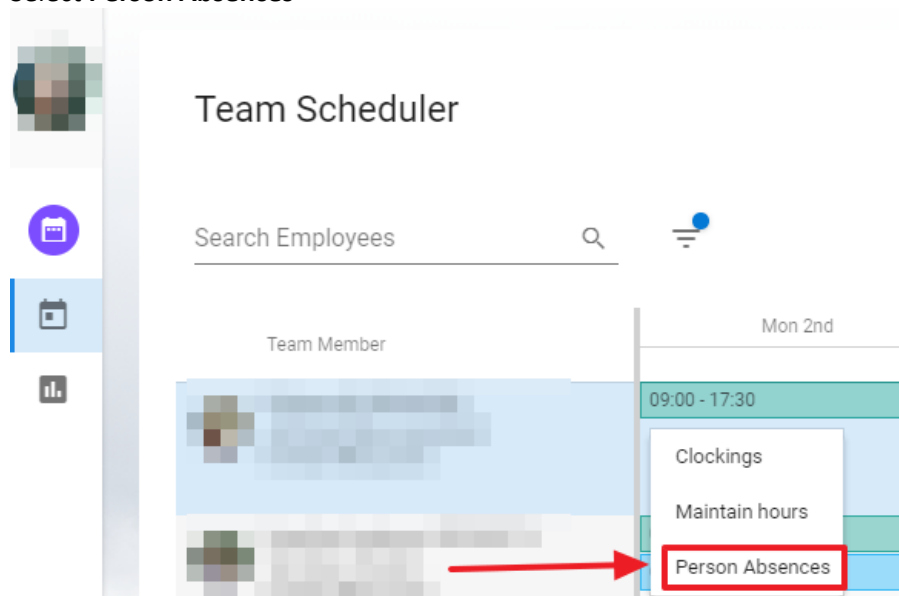
The screenshot shows the 'Absence Details' page. The 'Leave Type *' dropdown menu is open, showing a list of leave types: Army Reserve Leave, Keep In Touch Days, Adoptive Leave, Annual Leave, Appointment, Certified Sick Leave (highlighted), Compassionate Leave, Conference / Seminar, and Exam Leave. The 'Start Date *' is '18-Feb-2020'. The 'Open Ended' toggle is turned off (grey). The 'Enter Duration' field is highlighted with a red box and contains a blue circle.

To delete or amend a leave request through Person Absences

Scenario 3: Let's say you previously approved leave to be taken but the person didn't take it. You now wish to delete the approved leave and restore the balance by 1 day. (Before it occurred, the employee should cancel it via their Portal)

To 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**



4. Select View/Edit Absence Details or **Delete Absence**.

A screenshot of a table with two columns: 'Weeks' and 'Num Docs'. The table has four rows of data. A red arrow points from the 'Delete Absence' option in a dropdown menu to the 'Num Docs' column. The dropdown menu also includes 'View/Edit Absence Details' and 'View Work Schedule'.

Weeks	Num Docs
0.71	0
0.14	0
0.57	0
0.14	0

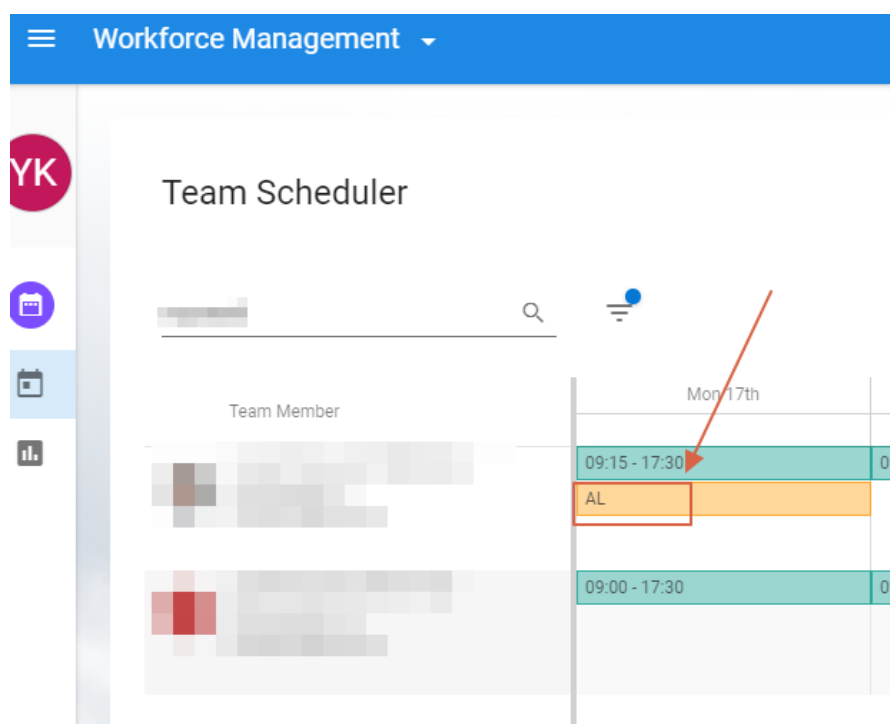
5. If you choose view/edit the Absence Details screen displays. It is possible to edit any element for any section of the absence record, as per the instructions above input (as above).

CHANGE AN APPROVED LEAVE REQUEST FROM A HALF DAY TO A FULL DAY

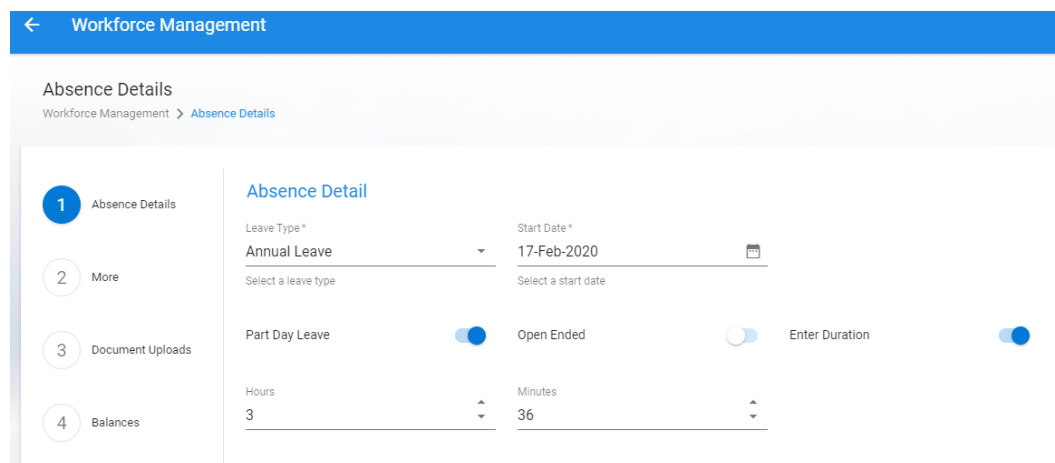
Scenario: Let's say an employee requested a half day annual leave and this was granted but subsequently the employee requested that the day be a full day.

Method 1

1. Go to **Workforce Manager Dashboard** then **Team Scheduler**.
2. Search for the employee and dates of absence.



3. When you double-click the annual leave in the **Team Scheduler** a new screen appears showing the half day that was approved.



4. You can overwrite the current leave by clicking off the **Part Day Leave and Duration Indicator**.

Absence Detail

Leave Type *
Annual Leave ▼
Select a leave type

Start Date *
17-Feb-2020
Select a start date

Part Day Leave ☒ Open Ended ☐ Enter Duration

Hours
3

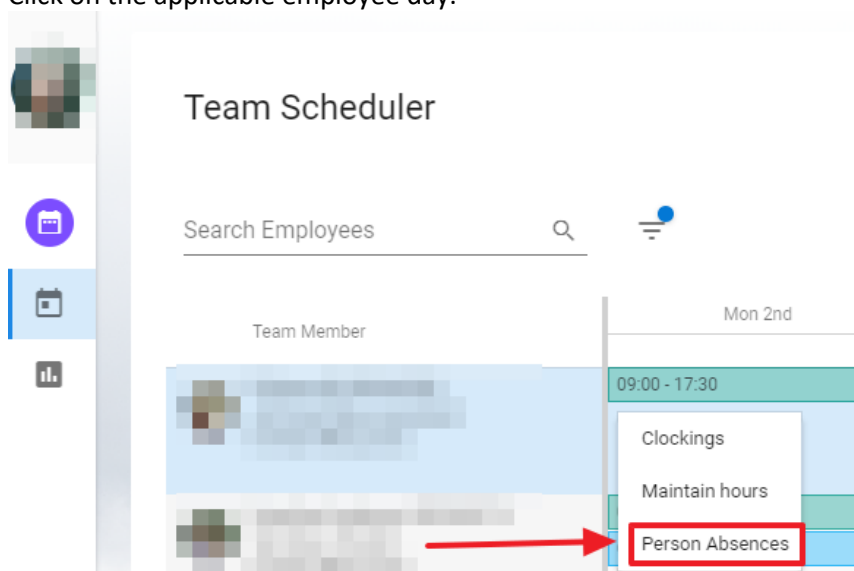
Minutes
36

5. Then Click **Save** (located at the bottom right hand corner of the screen).

Method 2

To view/edit an existing absence for the employee:

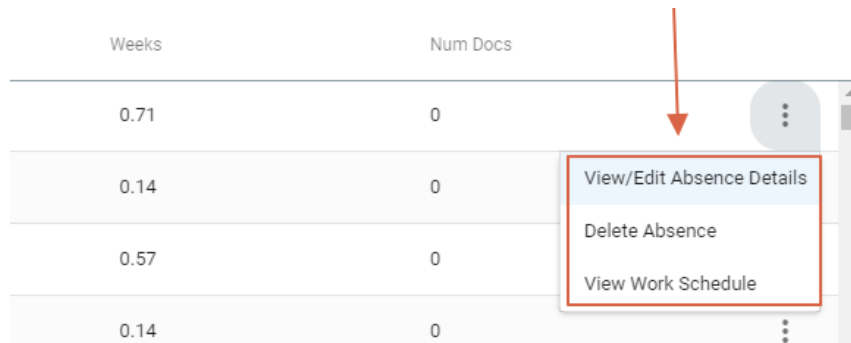
1. **Workforce Manager Dashboard** then **Team Scheduler**.
2. Click on the applicable employee day.



3. Select Person Absences



4. Select View/Edit Absence Details. Note that the Delete Absence and View Work Schedule options are available from this menu.



Weeks	Num Docs
0.71	0
0.14	0
0.57	0
0.14	0

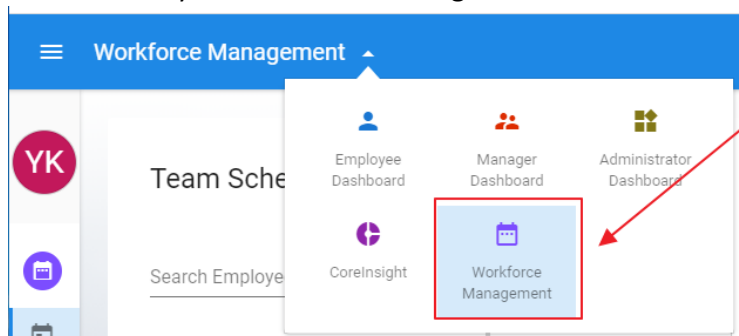
5. The Absence Details screen displays. It is possible to edit any element for any section of the absence record, as per the initial input (as above).

EMPLOYEE BALANCES

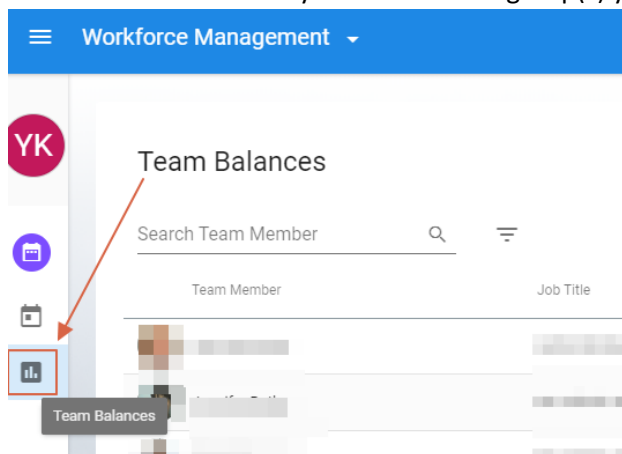
VIEW AND ADJUST BALANCES FOR EMPLOYEES ON COREPORTAL

It is possible to view balance information and complete balance management, for employees within your remit, from the *Team Balances* screen located on the *WFM Dashboard*. To access this screen:

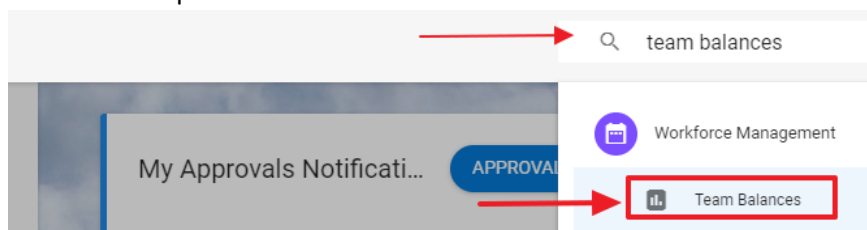
3. Go to your **'Workforce Management' Dashboard** and select **My Team**.




4. You click the **'Team Balances'** button on the left hand column to view the annual leave balances of everyone in the work group(s) you have access to.

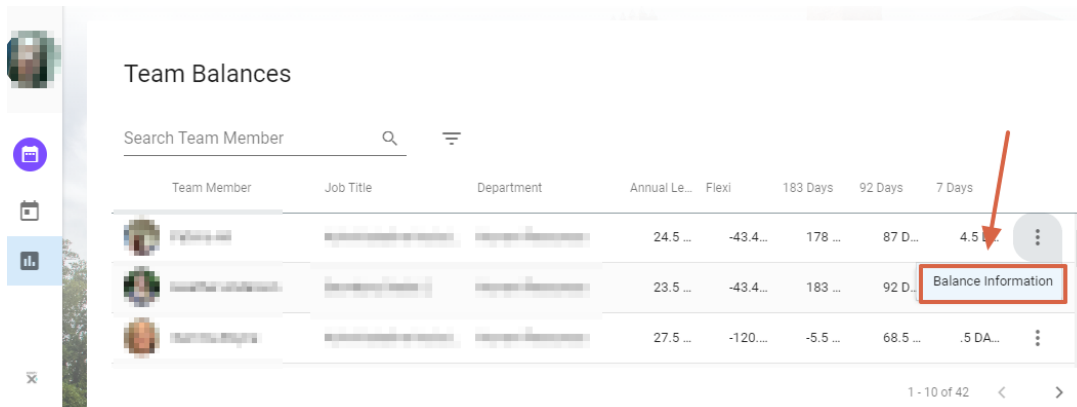


5. Alternative method to finding Team Balances is enter 'Team balances' in the search area at the top of the screen.





6. The *Team Balances* screen displays employees, dependant on your access to applicable *Team*.

1. Click the  button on the applicable employee.
2. Select **Balance Information**.



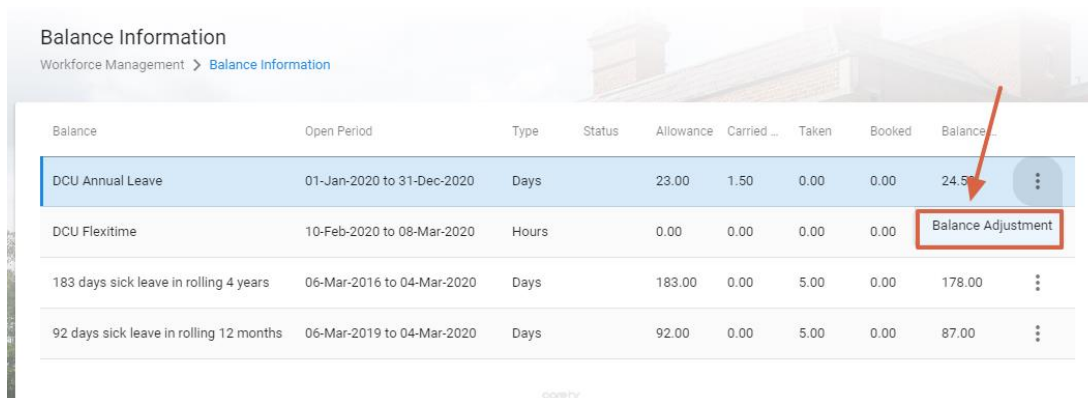
Team Balances

Search Team Member

Team Member	Job Title	Department	Annual Le...	Flexi	183 Days	92 Days	7 Days	
			24.5 ...	-43.4...	178 ...	87 D...	4.5 ...	
			23.5 ...	-43.4...	183 ...	92 D...		Balance Information
			27.5 ...	-120...	-5.5 ...	68.55 DA...	




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7. The *Balance Information* screen displays. From here, it is possible to review the employee's balances and make balance adjustments.



Balance Information

Workforce Management > Balance Information

Balance	Open Period	Type	Status	Allowance	Carried ...	Taken	Booked	Balance...	
DCU Annual Leave	01-Jan-2020 to 31-Dec-2020	Days		23.00	1.50	0.00	0.00	24.5...	
DCU Flexitime	10-Feb-2020 to 08-Mar-2020	Hours		0.00	0.00	0.00	0.00		Balance Adjustment
183 days sick leave in rolling 4 years	06-Mar-2016 to 04-Mar-2020	Days		183.00	0.00	5.00	0.00	178.00	
92 days sick leave in rolling 12 months	06-Mar-2019 to 04-Mar-2020	Days		92.00	0.00	5.00	0.00	87.00	

8. The *Balance Adjustment* screen displays. Here it is possible to adjust the balance details as required. For example, you may need to add *Carry Over* days at the start of the year for an employee.

1. Enter the balance adjustment details, for each item drop-down list.

Adjustment Details

Balance *	Period *	Date Effective *	
DCU Annual Leave	202001 (01-JAN-20 to 31-DEC-20)	20-Feb-2020	Adjust *

Reason for Adjustment

2. Select **Calculate Balance**.
3. Click **Save**.