NUI Galway

ESS Manager Dashboard

User Guide

V1.0

Table of Contents

Contents

Table of Contents 1

Access 2

How to Access ESS Manager Dashboard 2

Approve/Sign Off 4

Approve My Team's Weekly Hours 4

Clocking 7

Automatic & Manual Clocking 7

Unapproved Absence (Absence) 8

Unapproved Absence (Attendance Input) 11

Missed Clocking 15

Remove a Double Clocking 17

Leave 20

Annual Leave Request 20

Cancel Leave 23

Delegate Approval/Sign off 24

Notification Centre 27

Organisation Chart 28

View Team on the Organisation Chart 28

How to View your Team's Full Organisation Chart 30

Support 31

Where do I go for help? 31

Access

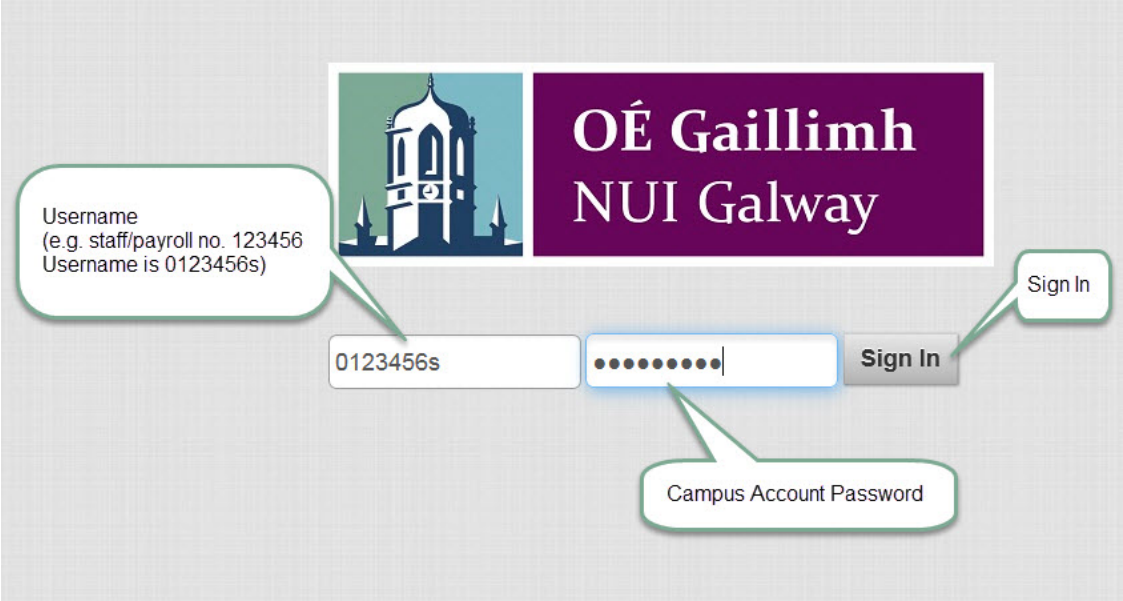
How to Access ESS Manager Dashboard

You can access **ESS Manager Dashboard** by logging into your **Employee Self Service (ESS)** Core Portal account.

1. Go online to:
   http://ess.nuigalway.ie
   OR
   https://cloud.corehr.com/pls/coreportal_nuiguat/cp_por_public_main_page.display_login_page

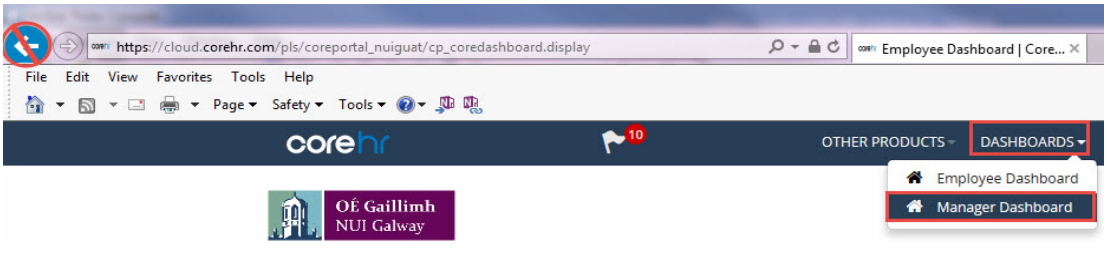
2. Login using your Campus Account / PC login credentials, and click **Sign In.**

> Your Campus Account Username is derived by preceding your six digit staff/payroll number with a leading zero '0' and add a trailing 's'. (e.g. staff/payroll no. 123456 is Username 0123456s).

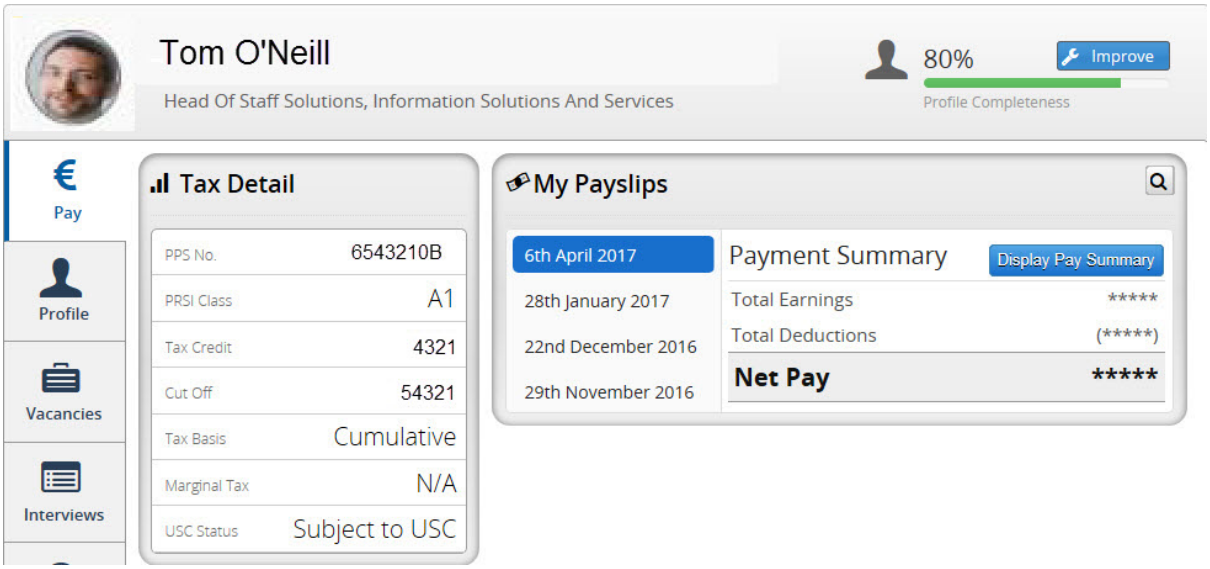


When you click login please allow a few seconds for the application to login. Do not re-enter your password.

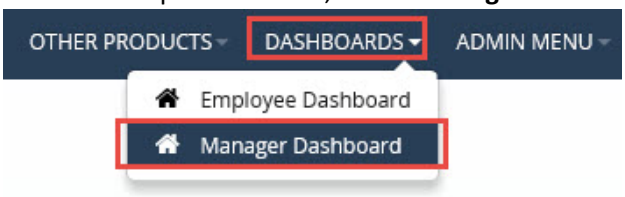
> To return to the main Manager Dashboard screen, go to the tool bar along the top of the page and click on **DASHBOARD** from the drop down menu, select **Manager Dashboard**. **Do not use the back arrow.**



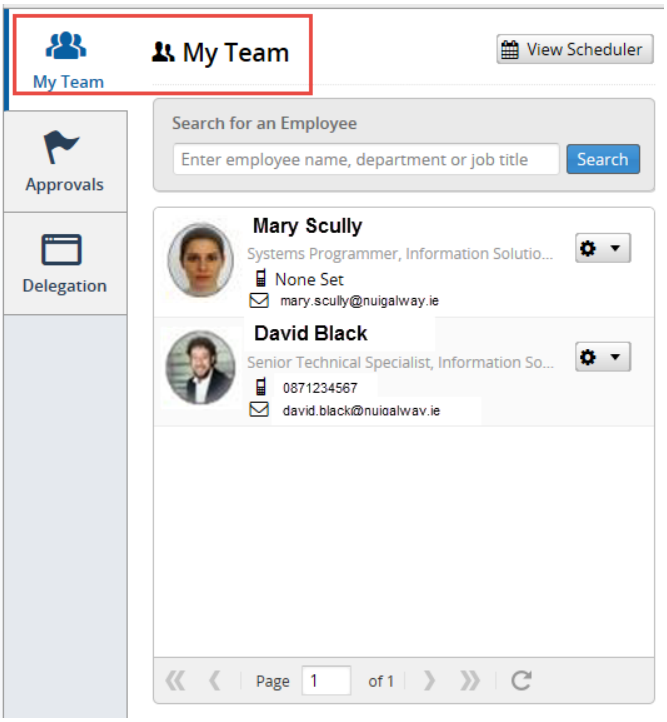
3. When you initially login to Employee Self Service (ESS), the ***Home*** screen is displayed.



4. Go to the tool bar along the top of the page and click on **DASHBOARDS**.
From the drop down menu, select **Manager Dashboard**.



5. The **My Team** screen is now available to you. Your Team members are listed here.

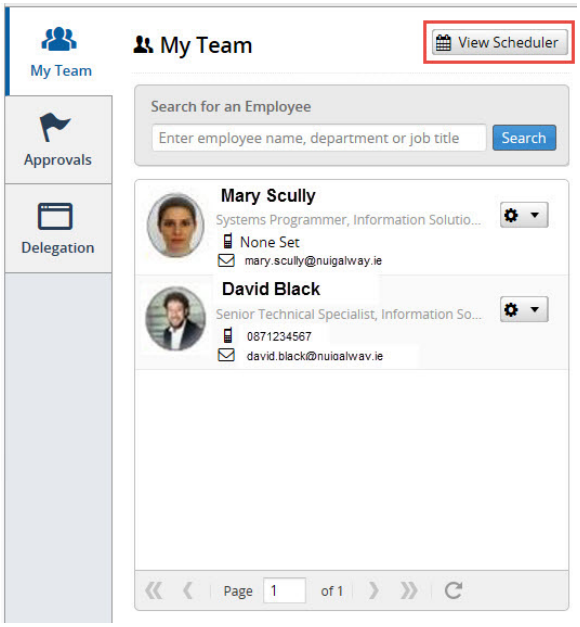


Approve/Sign Off

Approve My Team's Weekly Hours

My Team gives you access to View your Team's profiles, including contact details, training record and job specifications.

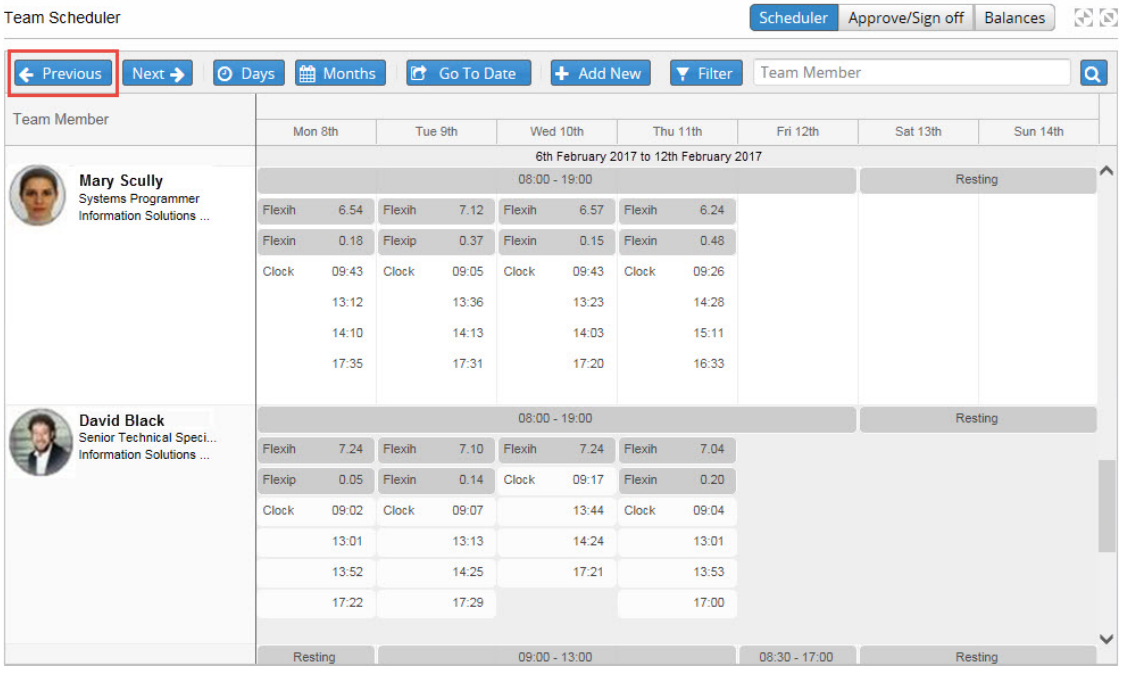
1. To Approve/Sign off weekly hours, from the My Team screen click **View Scheduler.**



2. The Team Scheduler screen will open.

> Your Team's attendance details for the **current** working week will automatically be displayed.

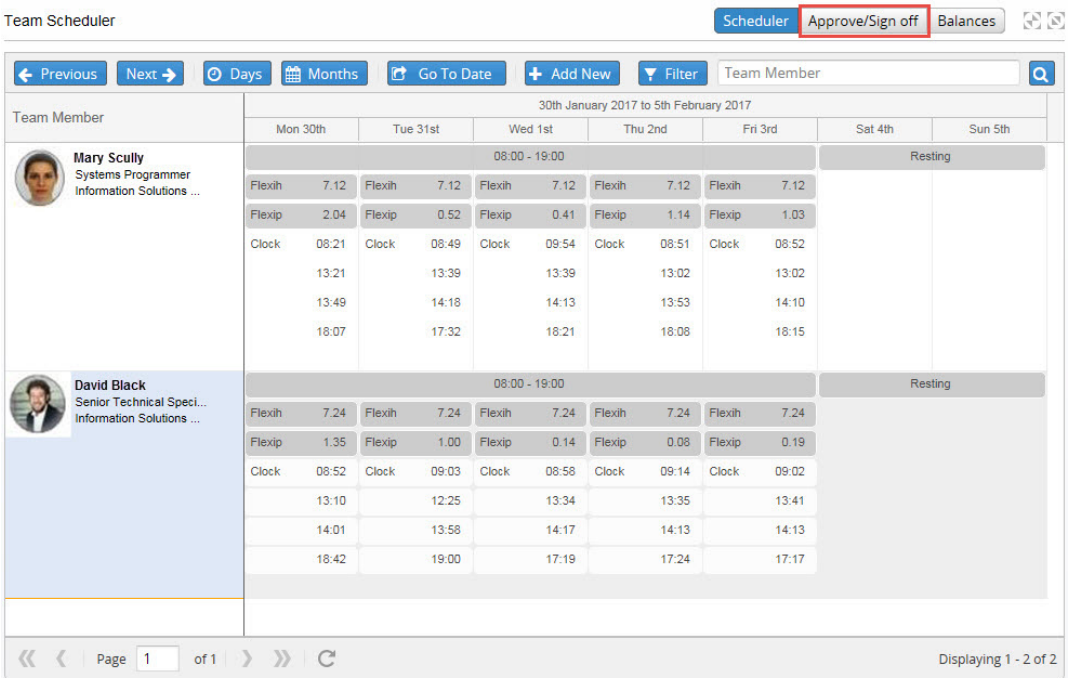
To view hours for the week just past, using the blue button click **Previous**.



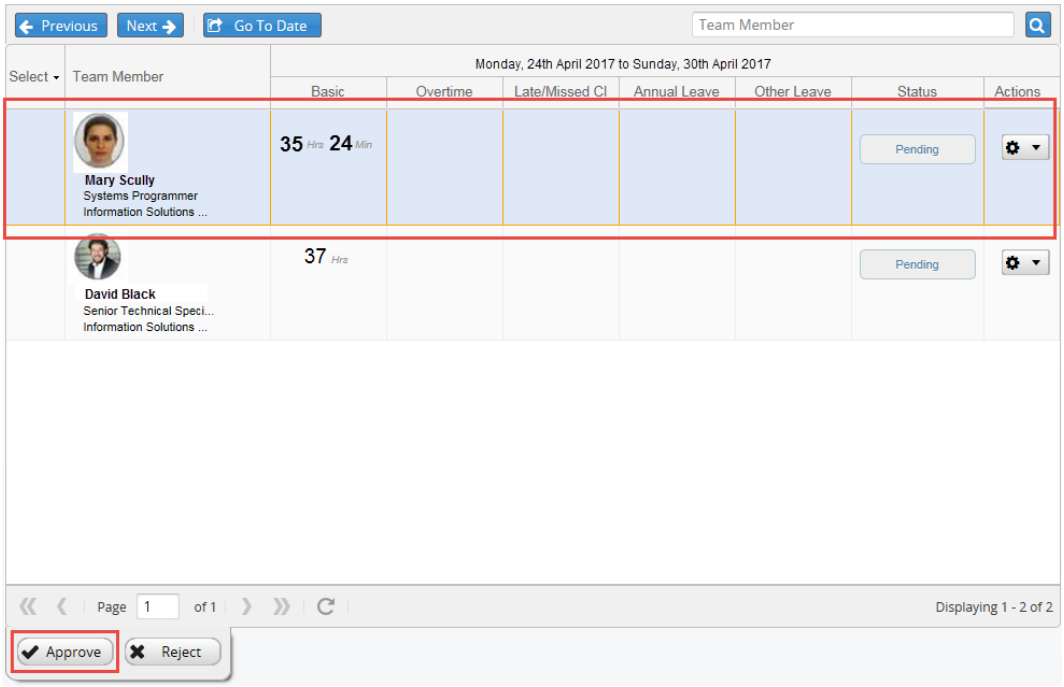
3. Your Team's calculated weekly hours will now be displayed.

> Your Team's calculated hours for this week will automatically be displayed.
> Note: Calculations are now automatically processed nightly.

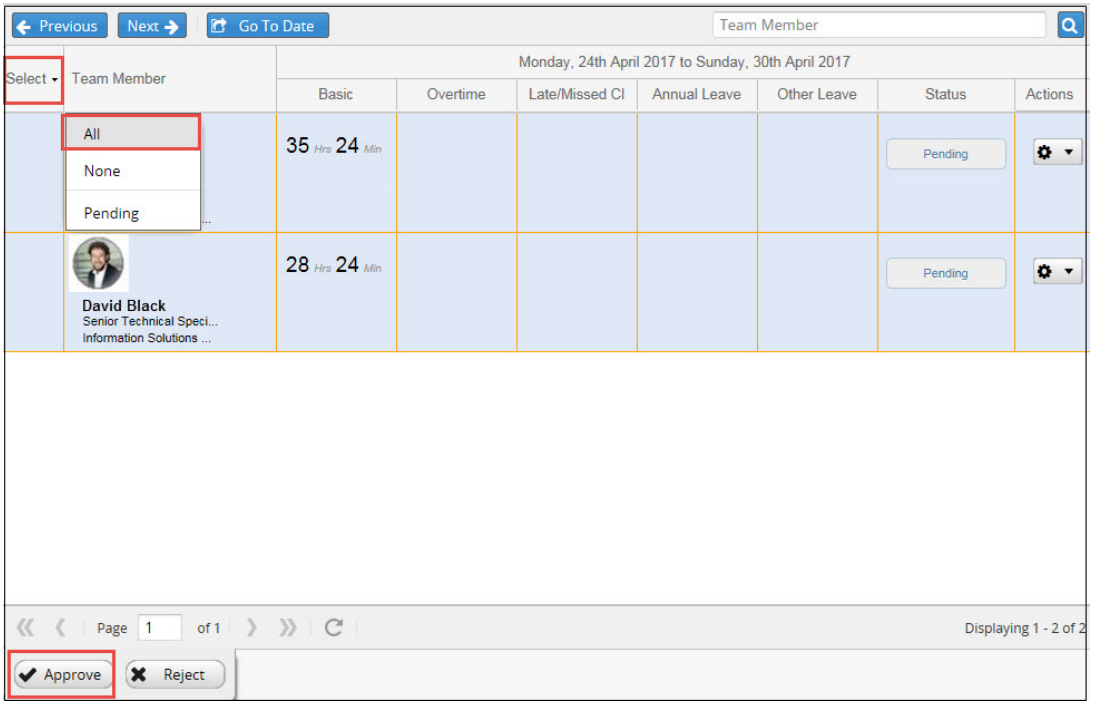
To Approve/Sign off hours for the week just past, using the blue button click **Previous**. Click **Approve/Sign Off.**



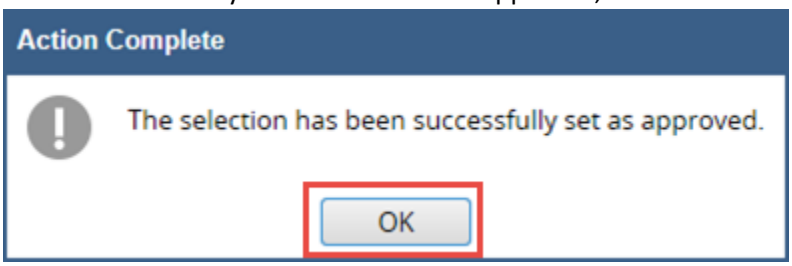
4. **a**) To approve a single member of your Team. Click on the individual Team member. Once your Team member is selected, scroll to the bottom of the screen and click **Approve.**



b) To approve **All your Team members** weekly hours, go to the left of the screen click **Select** and **All.** Once all your Team is selected, scroll to the bottom of the screen and click **Approve.**

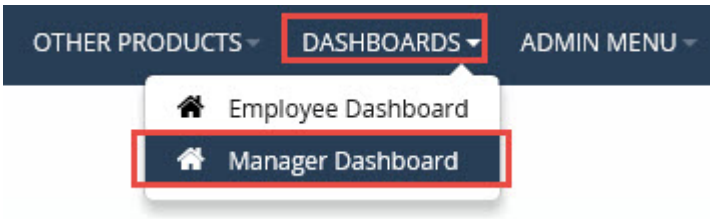


5. Your Team's weekly time has now been approved, click **OK.**



You can now return to the Manager Dashboard or Logout.

Go to the CoreHR tool bar along the top of the page and click on **DASHBOARDS**. From the drop down menu, select **Manager Dashboard**.



Clocking

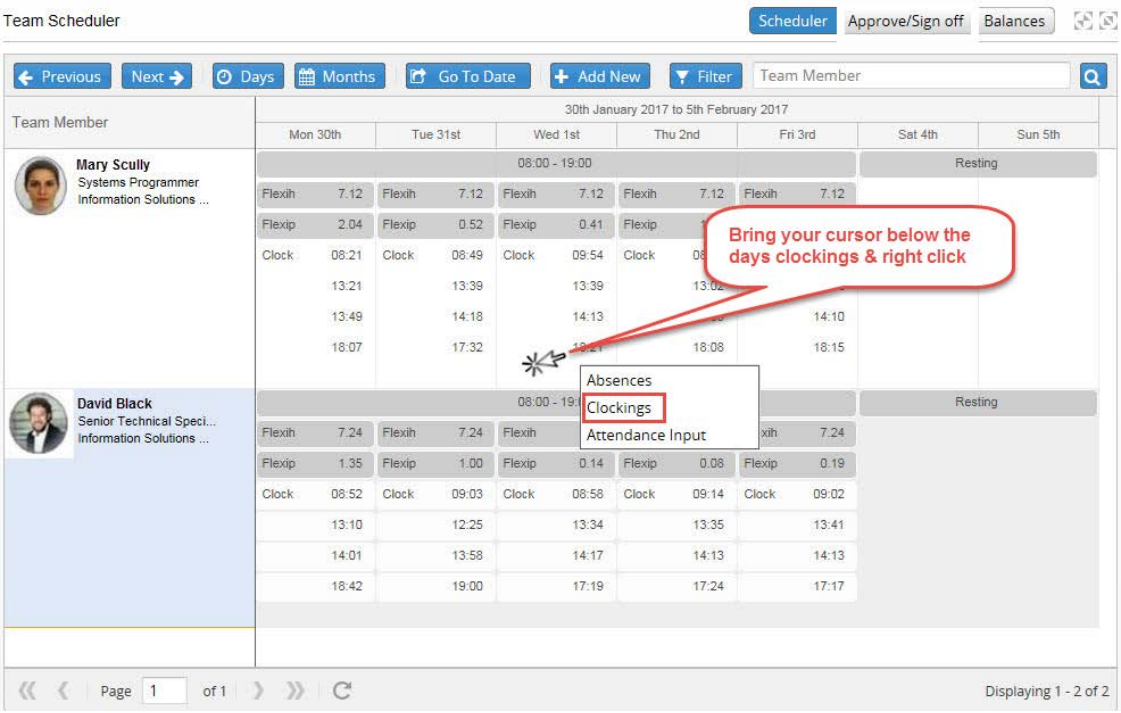
Automatic & Manual Clocking

To view and if a clocking is automatic or manual, on the **Team Scheduler** screen.

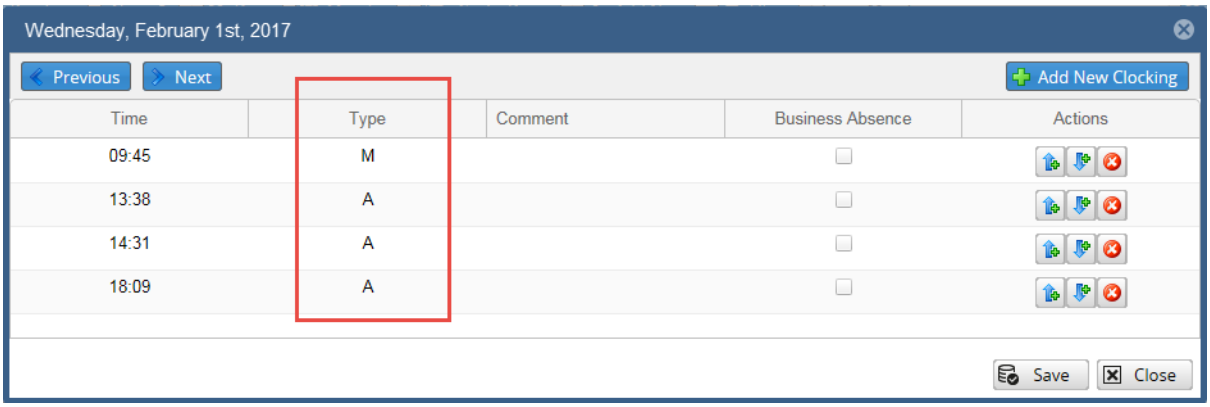
1. Move your cursor to that particular **Day.**

> **Important:** Your cursor must **right click** below the day's clockings.

You can now right click, and the clocking menu will open. Click on **Clockings.**

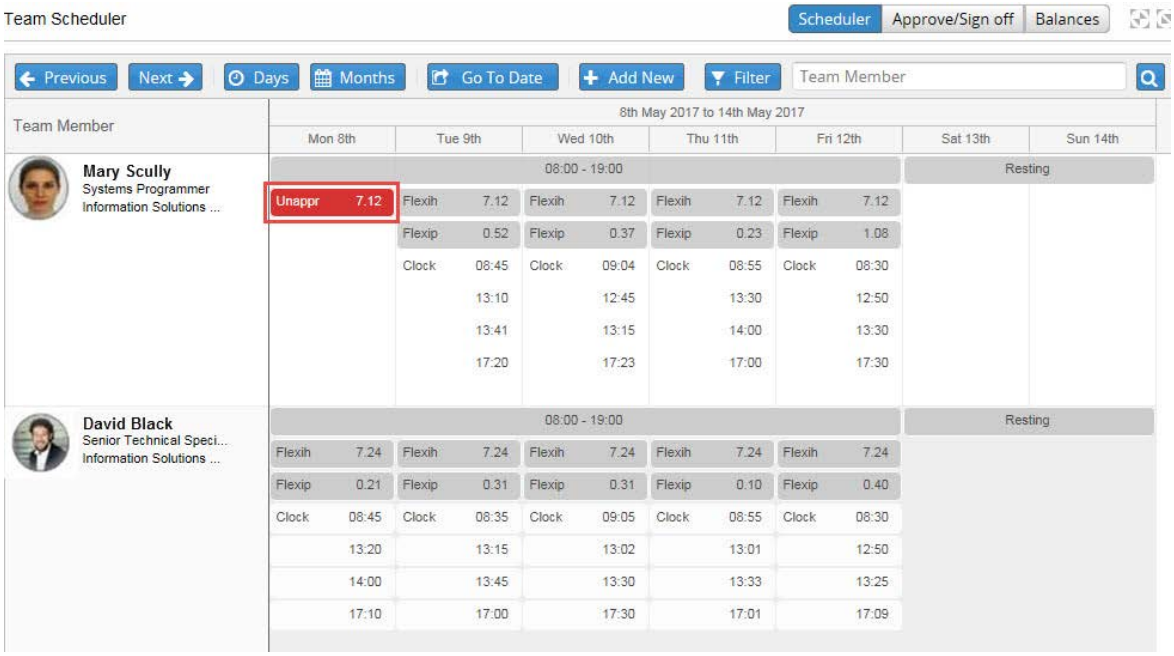


2. The day's clockings window will open. Under **Type** the clockings will be listed as **A** or **M**.
A = automatic / M = manual



Unapproved Absence (Absence)

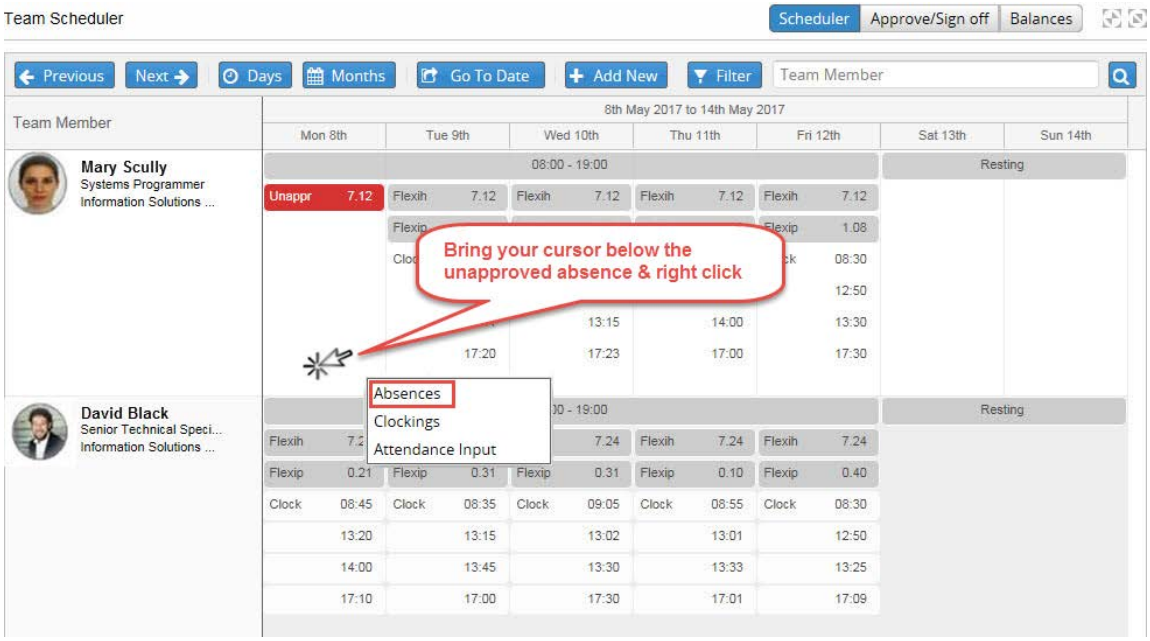
1. Unapproved Absence will be highlighted in the Team Scheduler screen.



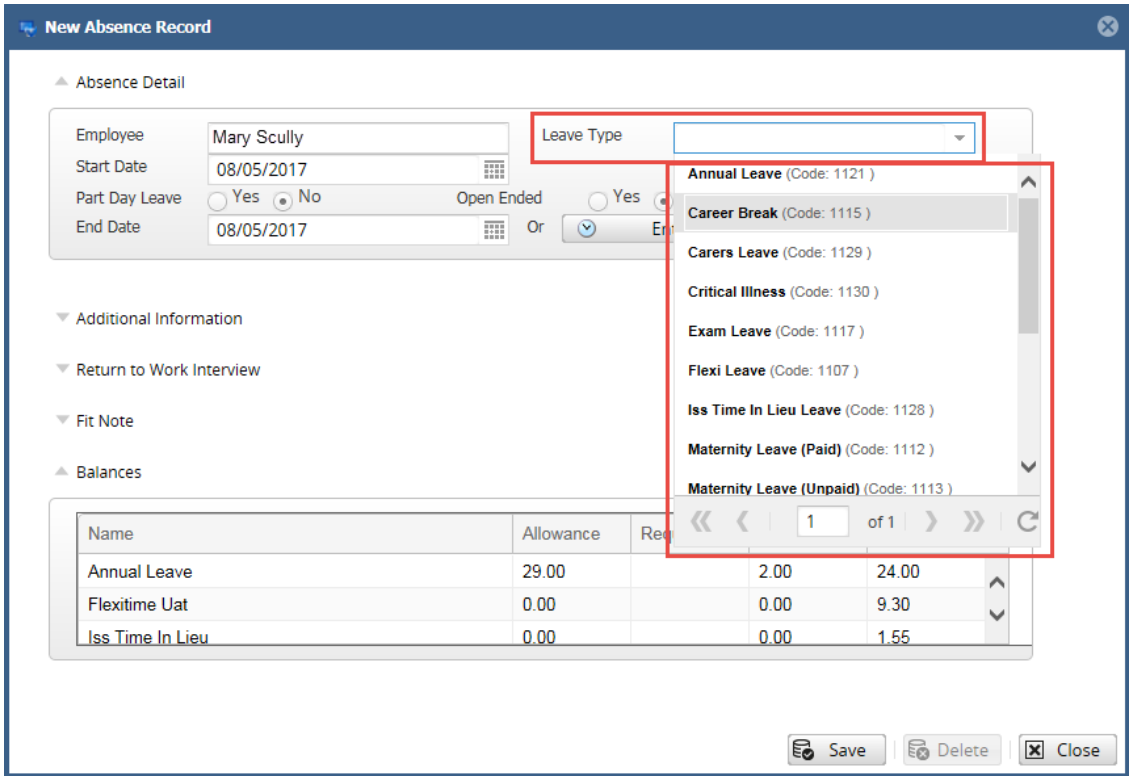
2. Move your cursor to that particular **Day.**

> **Important:** Your cursor must **right click** below the Unapproved Absence and **not** the "**Unapproved**" error itself.

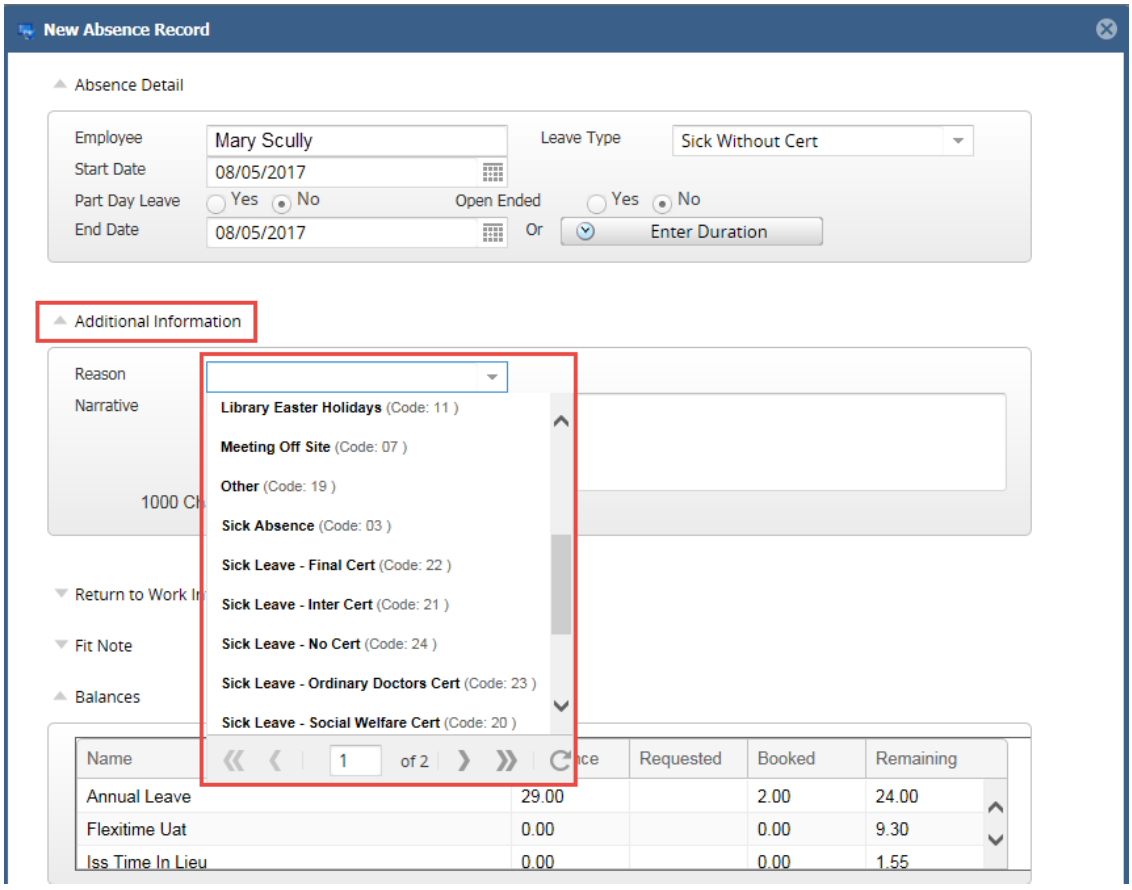
You can now right click, and the clocking menu will open. Click on **Absences.**



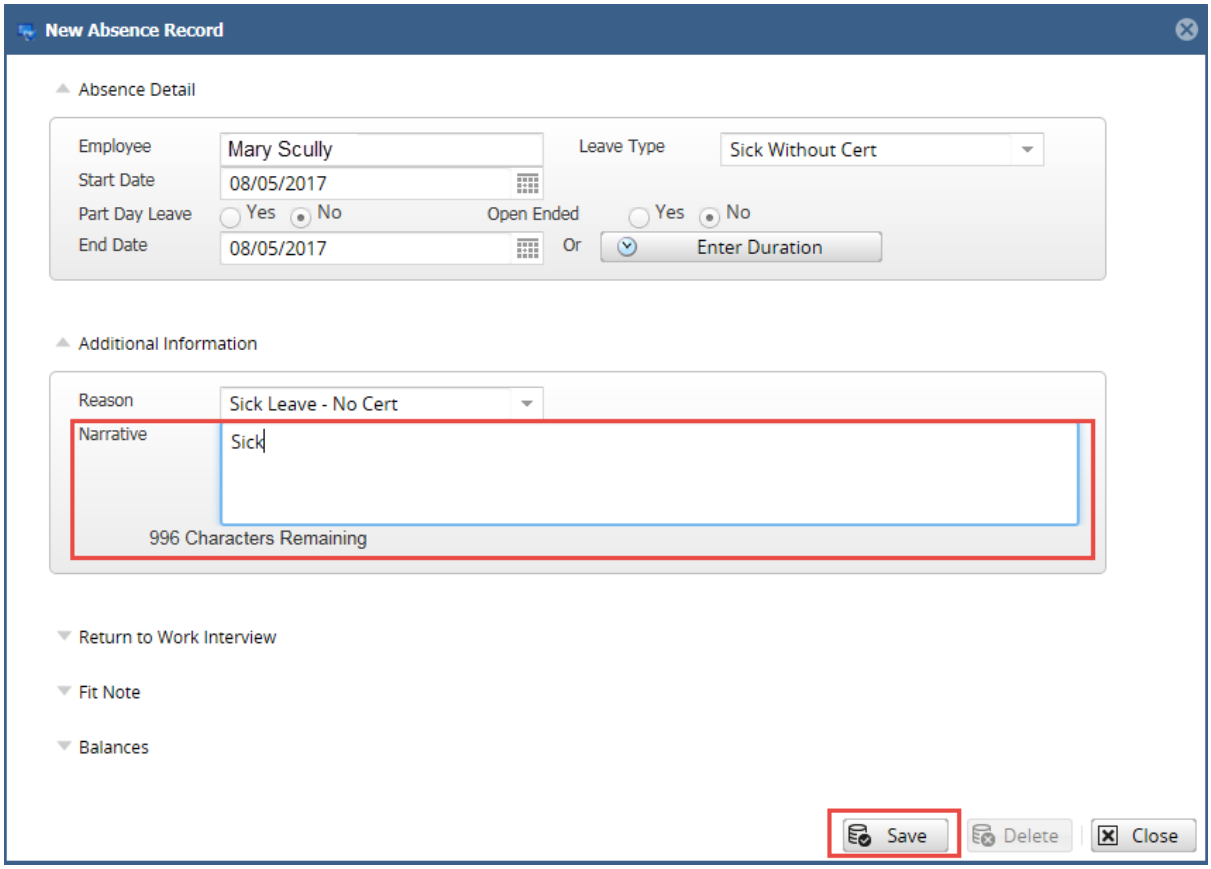
3. The **New Absence Record** window will open. Click the **Leave Type** down arrow and scroll to select the appropriate absence.



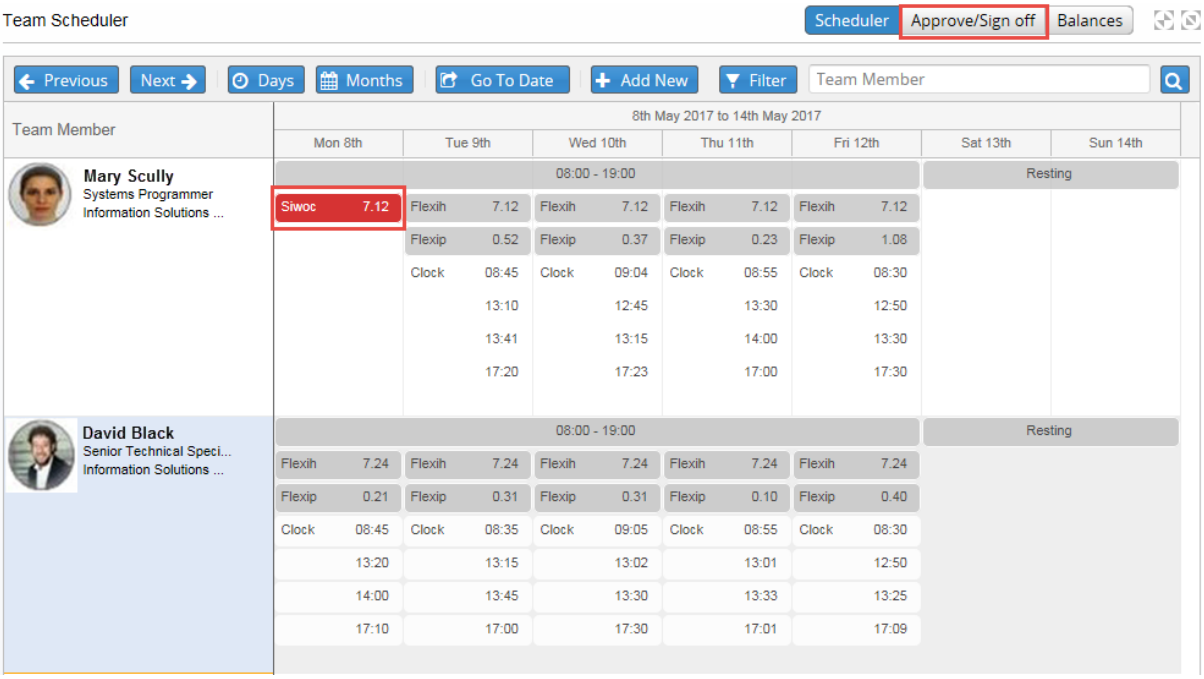
4. Click the **Additional Information** down arrow. Click the **Reason** down arrow and select the appropriate absence for the list provided.



5. Within the **Narrative** window, you can enter more free text information. Go to the bottom of the screen and click **Save**.

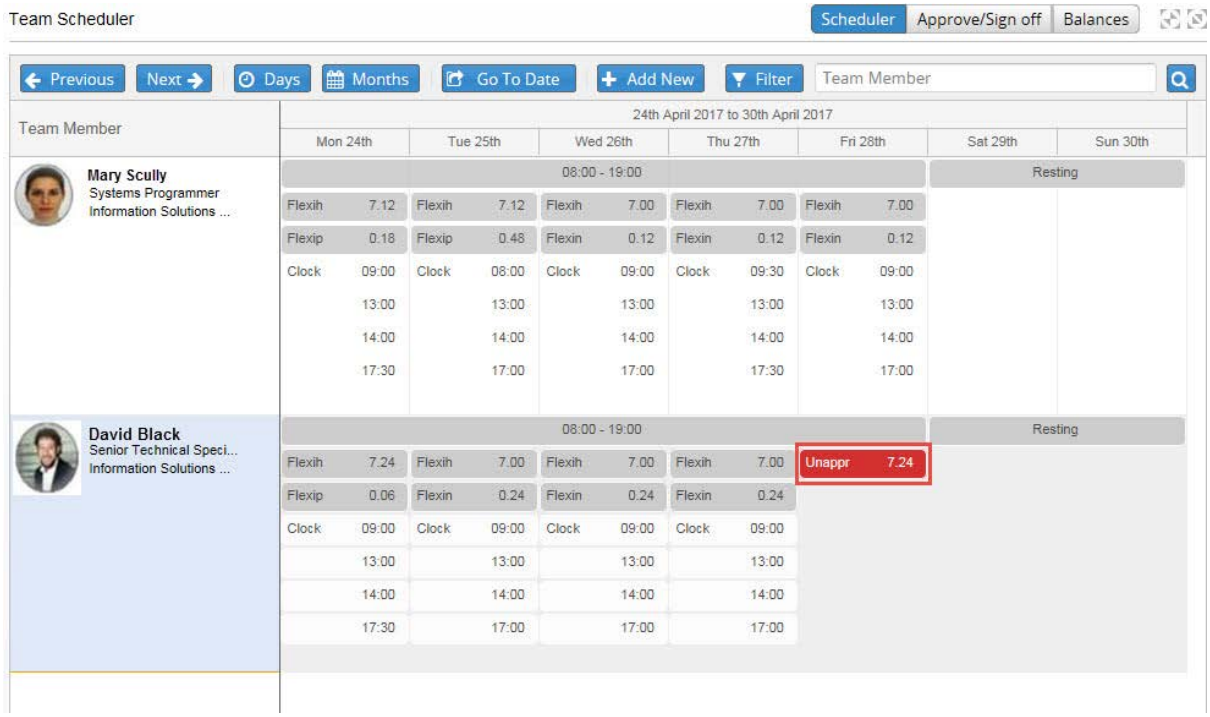


6. The Unapproved Absence has now been categorised, you can now continue to **Approve/Sign Off** your Team's weekly hours.



Unapproved Absence (Attendance Input)

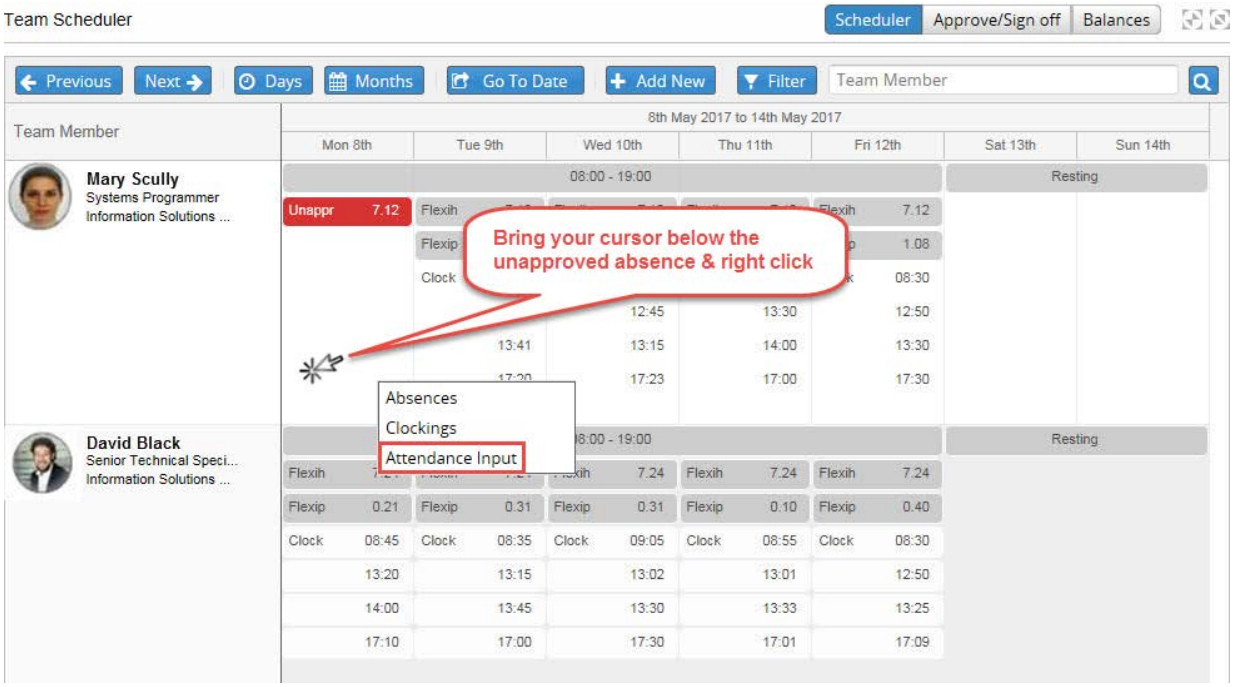
1. Unapproved Absence will be highlighted in the Team Scheduler screen.



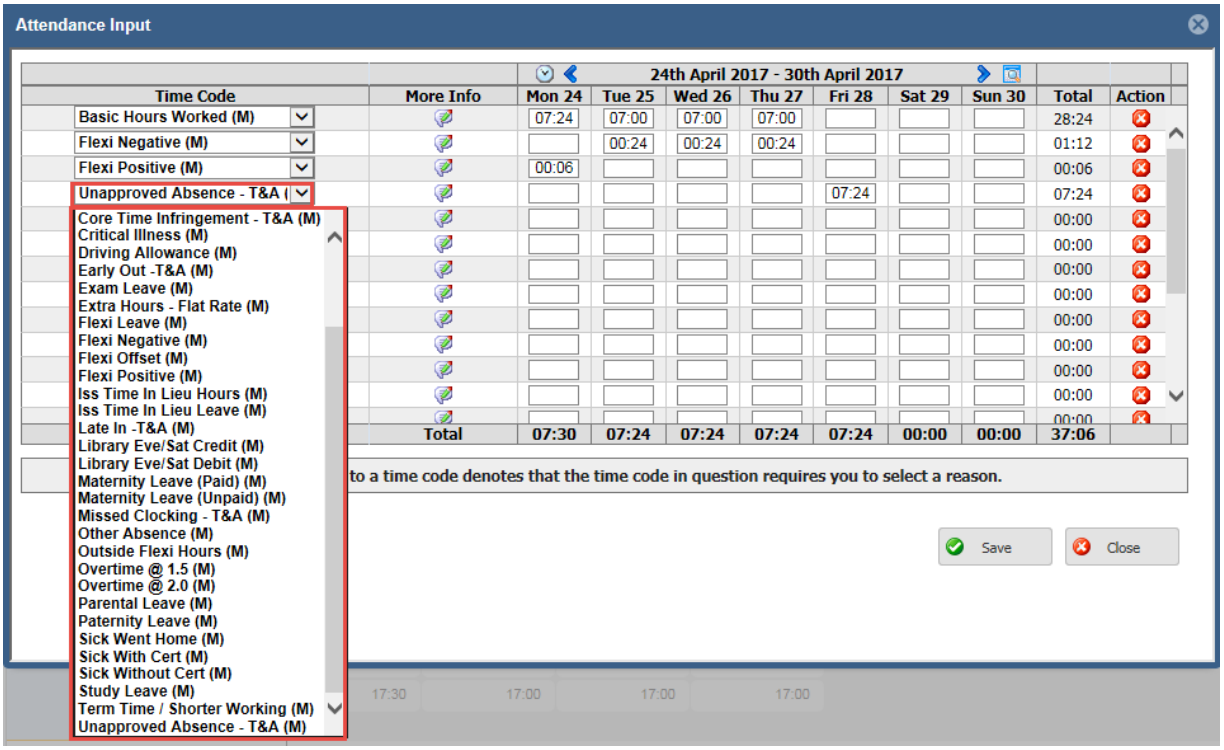
2. Move your cursor to that particular **Day.**

> **Important:** Your cursor must **right click** below the Unapproved Absence and **not** the "**Unapproved**" error itself.

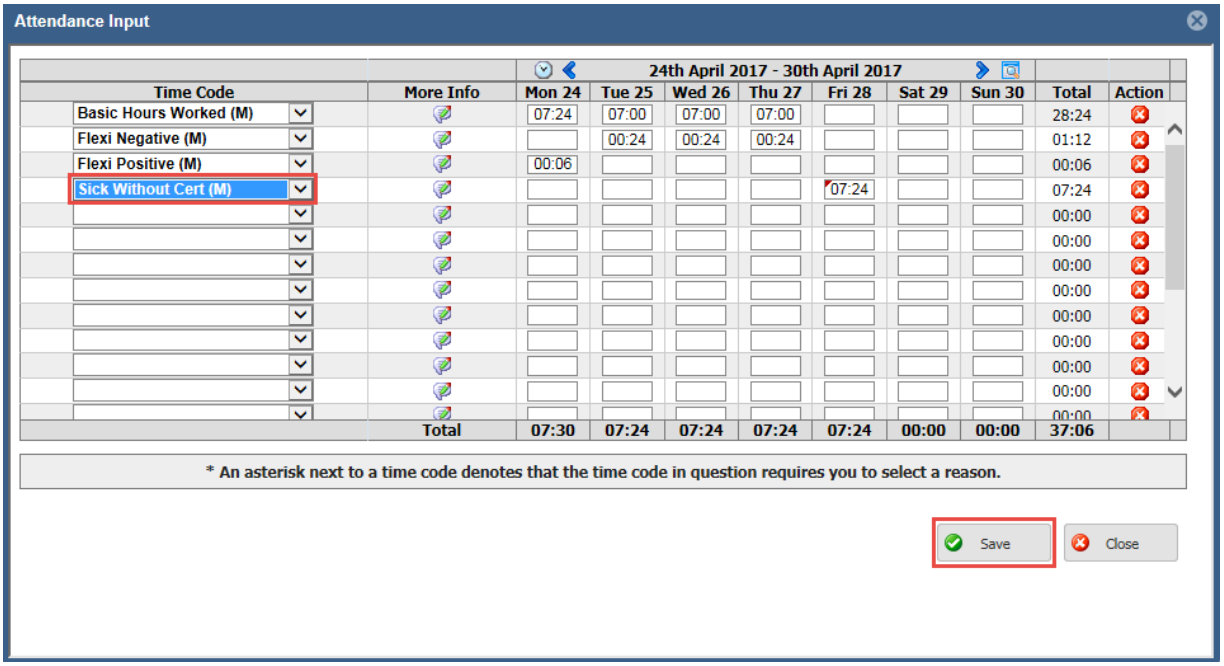
You can now right click, and the clocking menu will open. Click on **Attendance Input**.



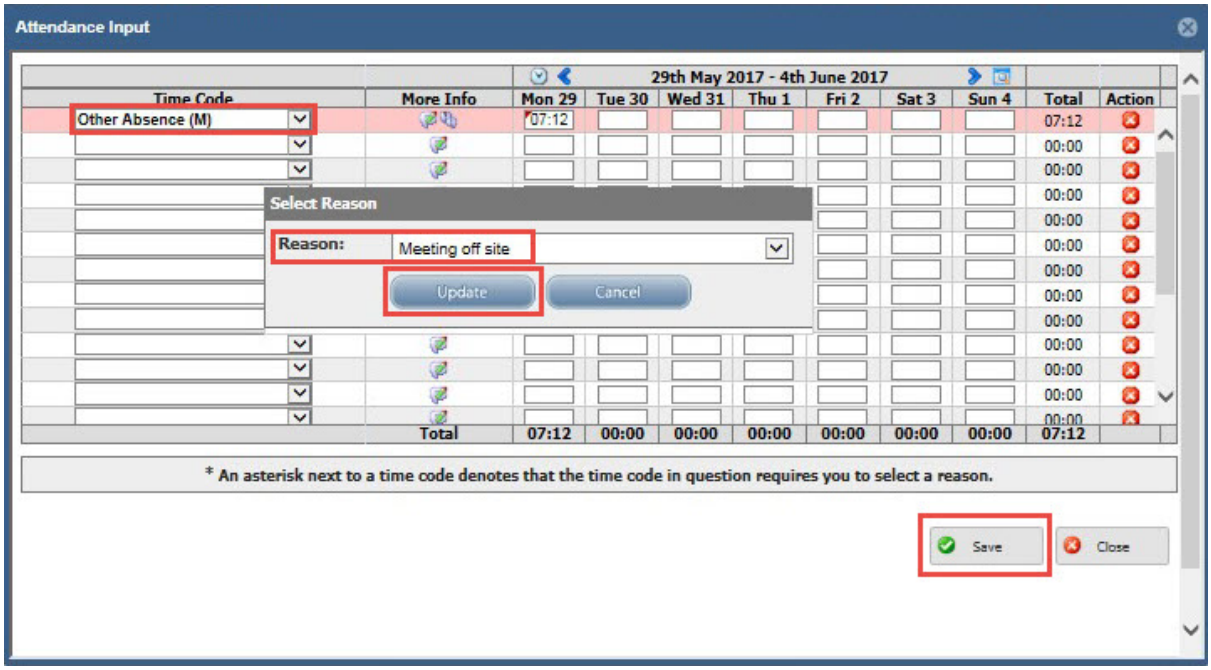
3. The **Absence Input** window will open. Click the **Unapproved Absence** down arrow and scroll to select the appropriate absence.



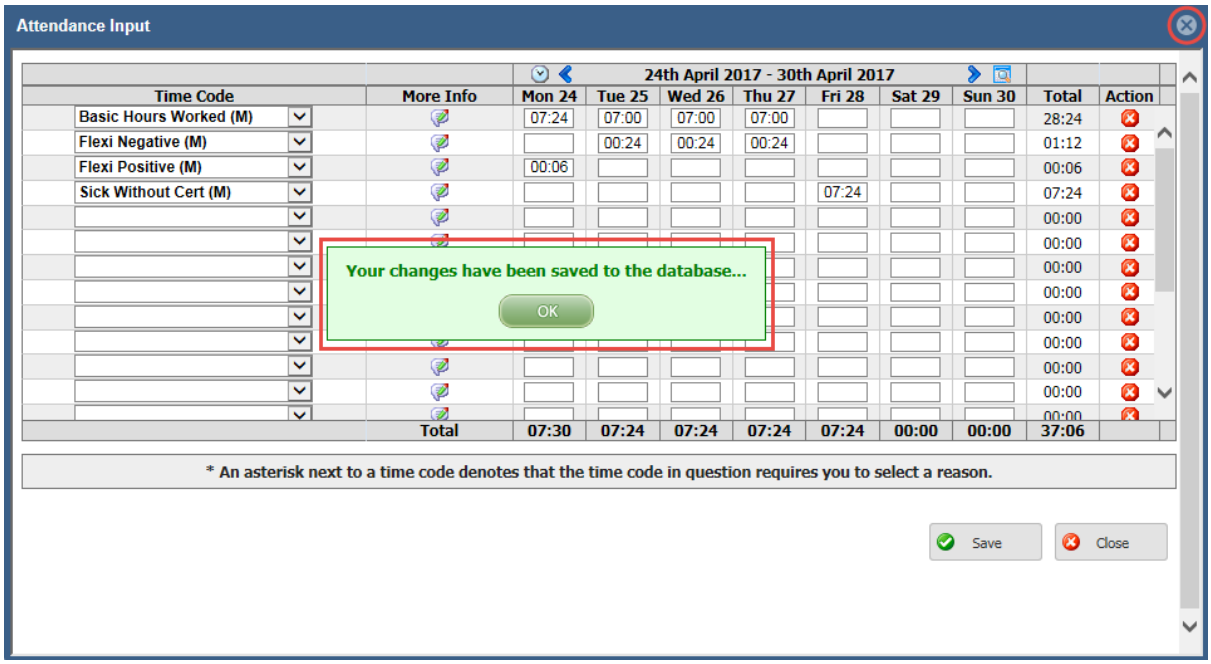
4. Once you have selected the appropriate absence, click the **Save.**



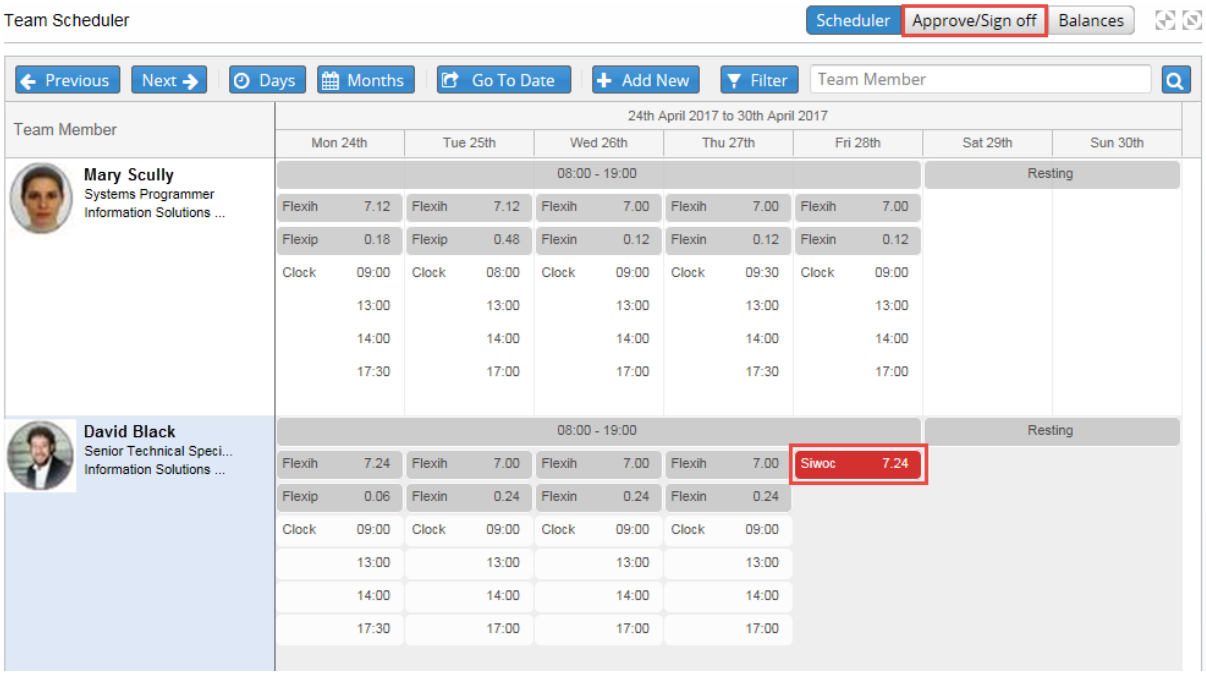
5. Note: If you select **Other Absence,** you will be prompted to enter a **Reason**. Please enter a Reason and click **Update** and **Save.**



6. You will receive confirmation your changes have been saved, click **OK** and **X** to close this window.

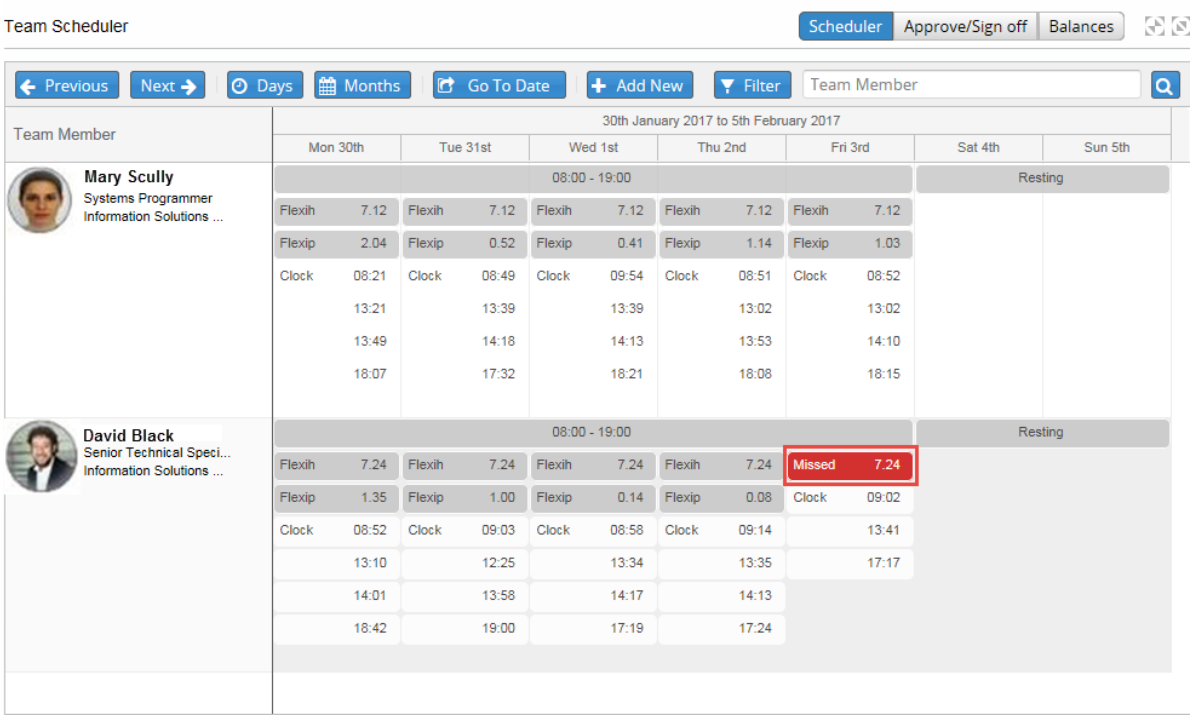


7. The Unapproved Absence has now been categorised, you can now continue to **Approve/Sign Off** your Team's weekly hours.



Missed Clocking

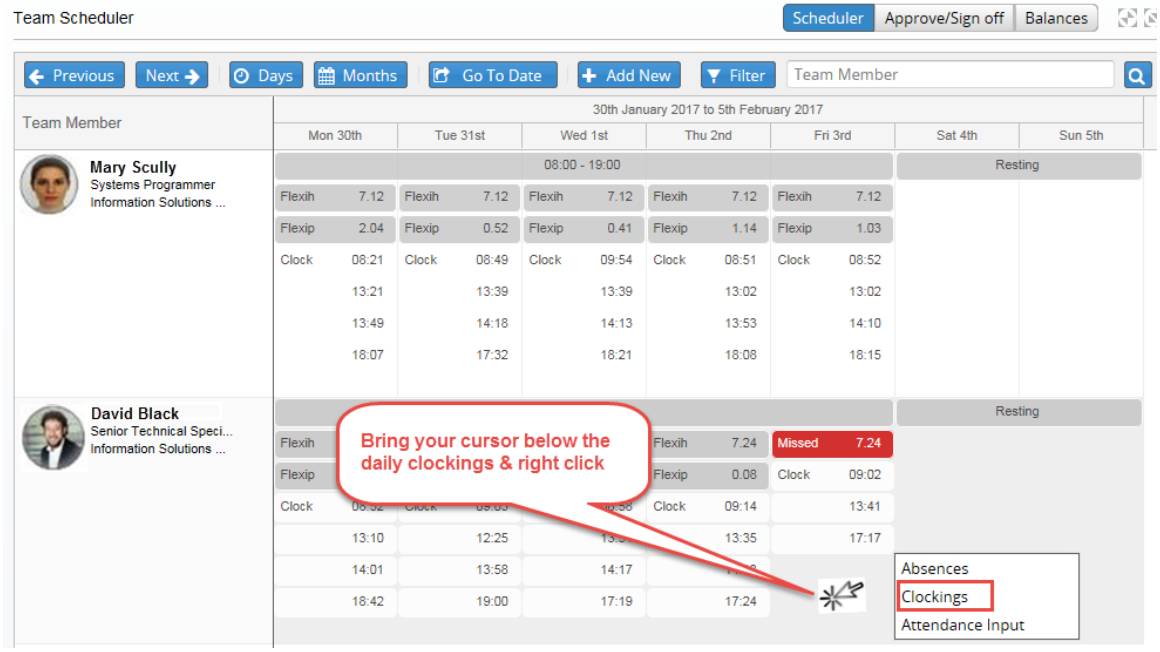
1. If a Team member missed a clocking, you can manually add a clocking. The missed clocking will be highlighted in the Team Scheduler screen.



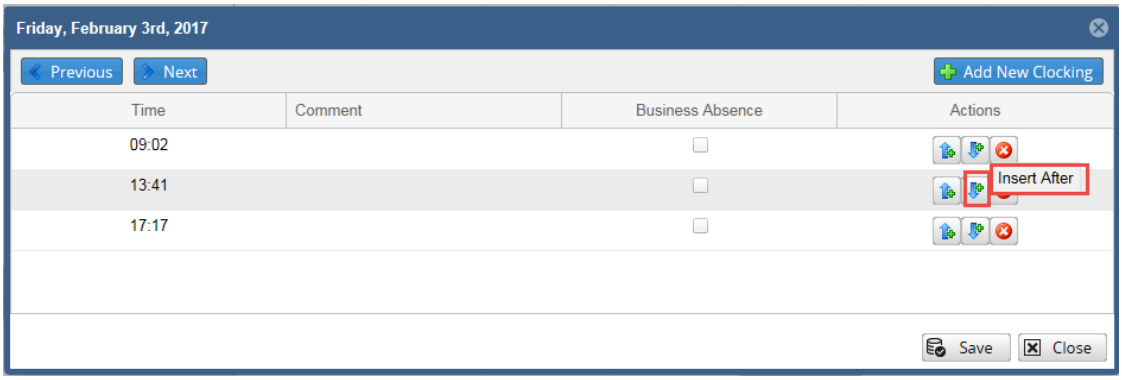
2. To add a clocking, move your cursor to that particular **Day.**

> **Important:** Your cursor must **right click** below the daily clocking times and **not** the "**Missed**" error itself.

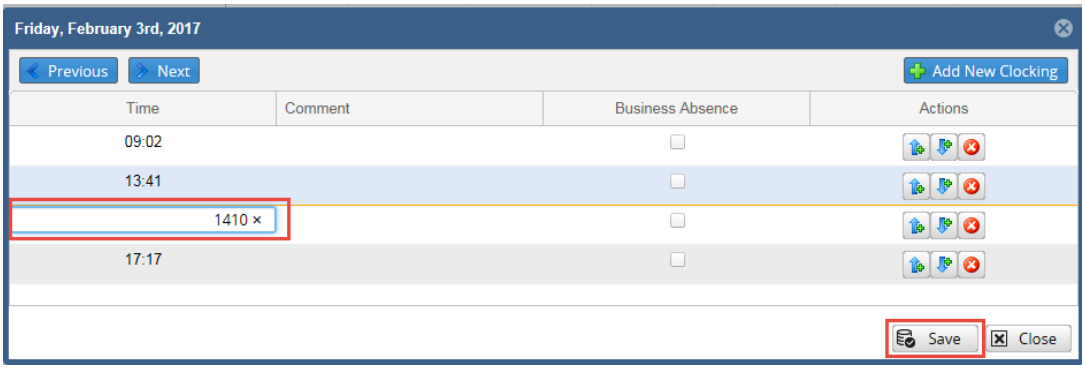
You can now right click, and the clocking menu will open. Click on **Clockings.**



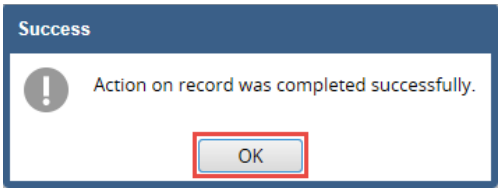
3. The Day Clockings screen will open. Click the **blue down arrow / Insert After** where you want to add the clocking.



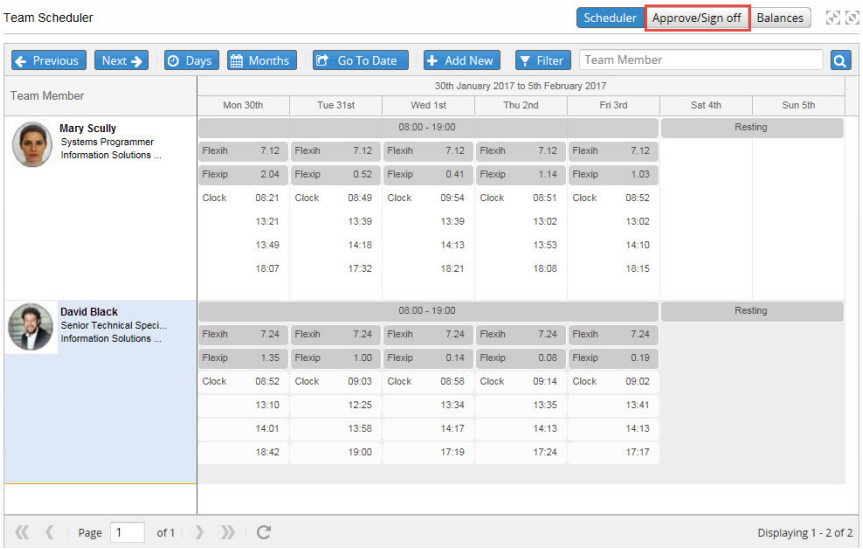
4. You will be prompted to enter a clocking time. Enter a clocking time (24hour clock) and click **Save.**



5. Click **OK** to confirm.

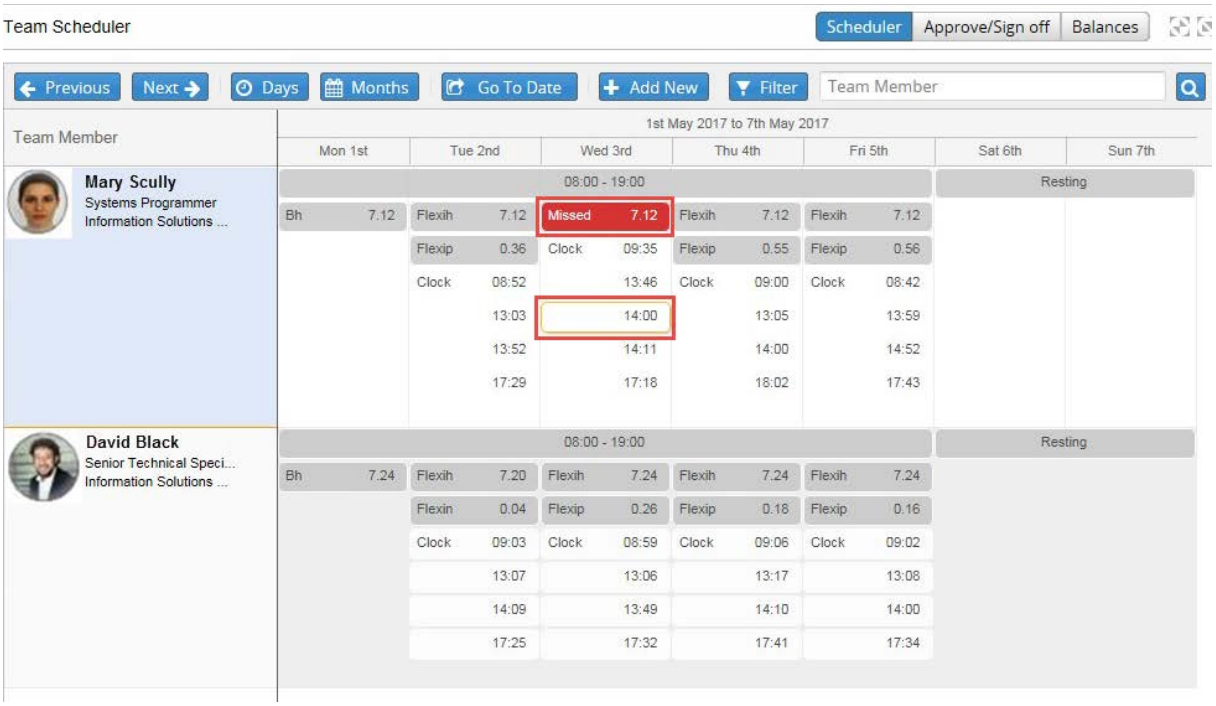


6. You are returned to the Team Scheduler screen to complete **Approve/Sign off** your Team's weekly hours.



Remove a Double Clocking

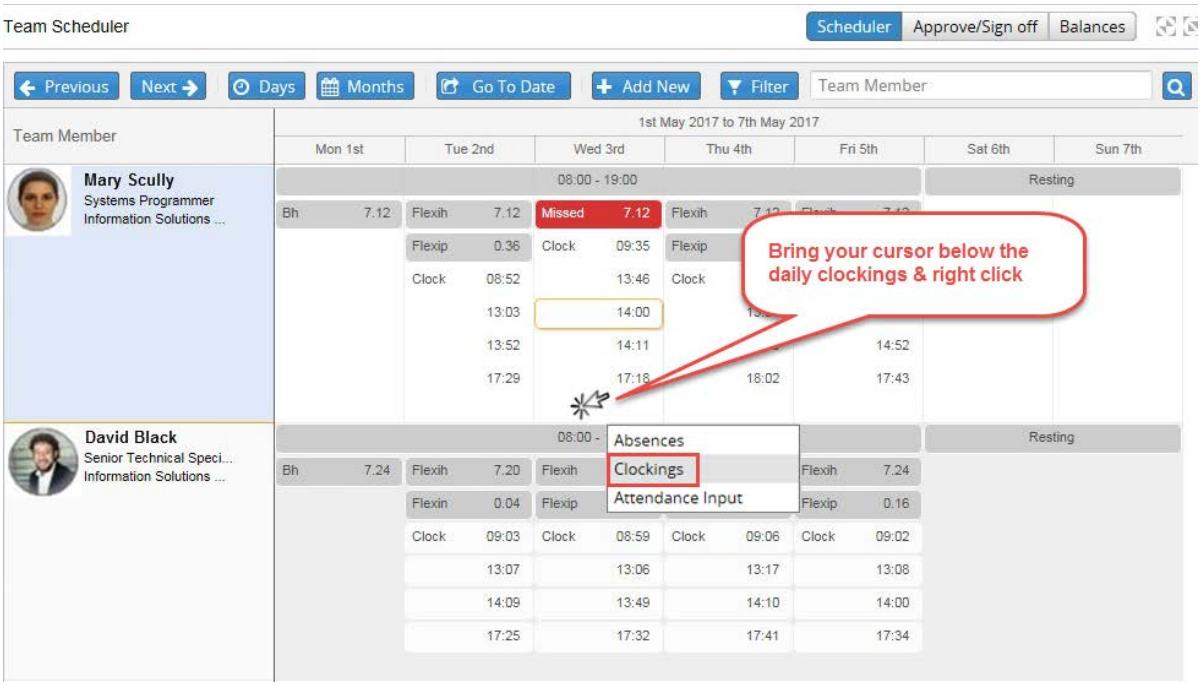
1. If a Team member mistakenly clocked twice, this will be highlighted in the Team Scheduler screen. A **Missed** error will show on the day of the double clocking.



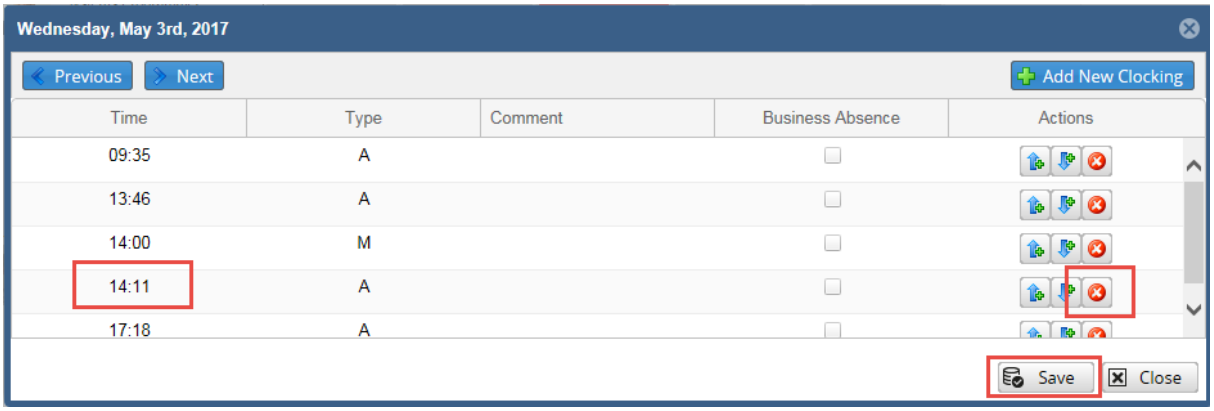
2. To remove the incorrect clocking, move your cursor to that particular **Day.**

> **Important:** Your cursor must **right click** below the daily clocking times and **not** the "**Missed**" error itself.

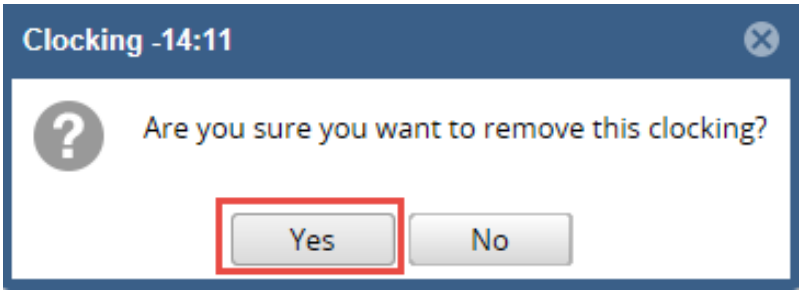
You can now right click, and the clocking menu will open. Click on **Clockings.**



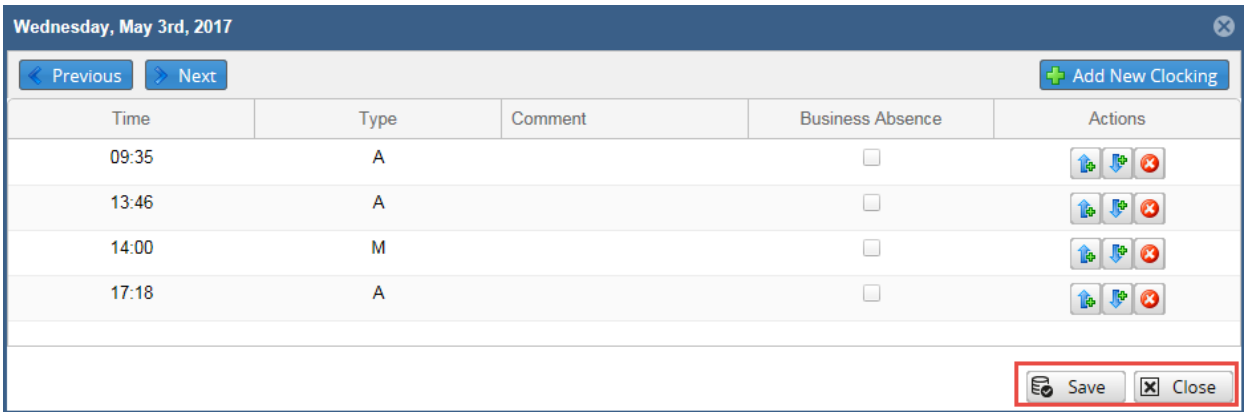
3. The Day clockings screen will open. Go to the incorrect clocking, move to the right of the screen and click on the **delete** button. Click **Save.**



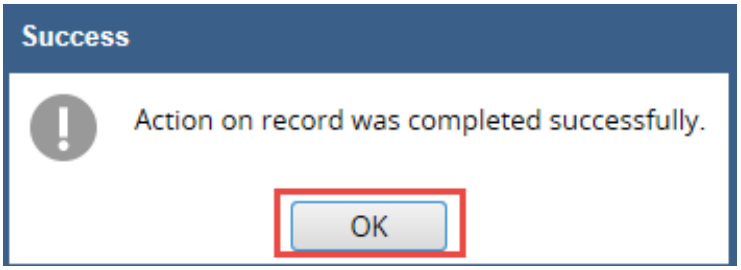
4. You will be prompted to confirm you wish to remove the clocking, click **Yes.**



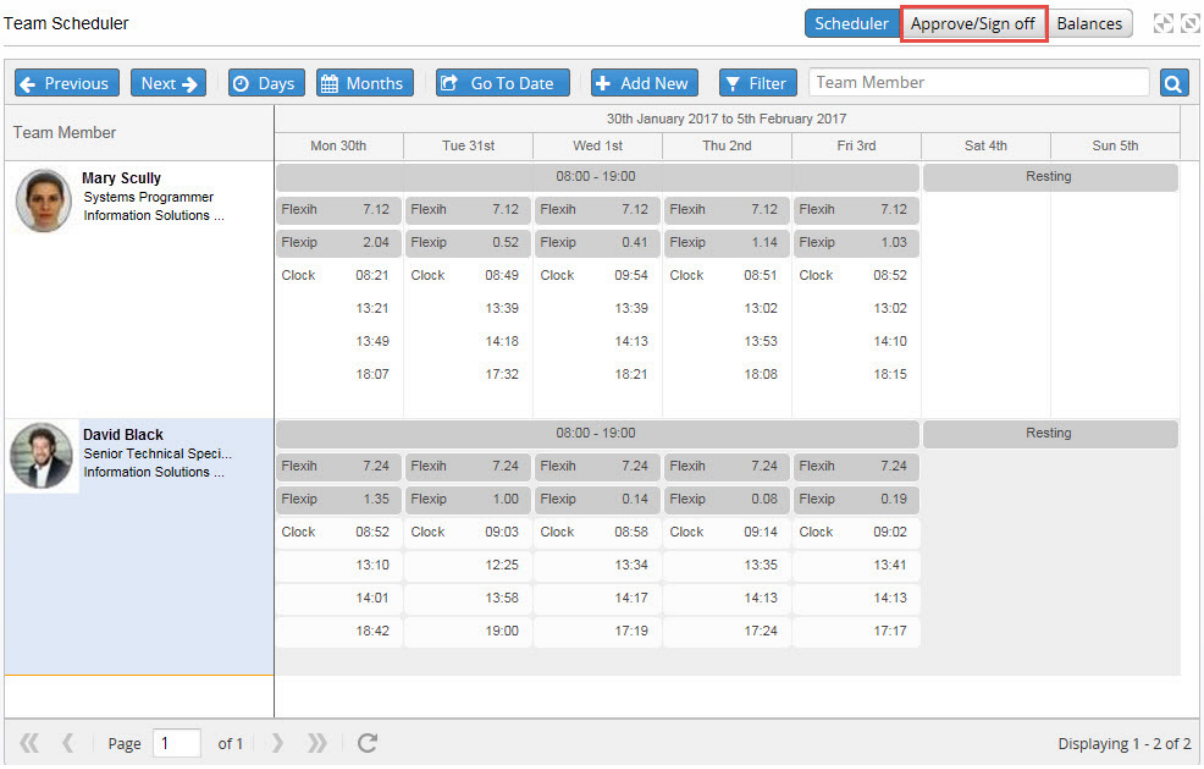
5. The Day clocking will now show the remaining (and correct) clockings.
Click **Save** & click **Close.**



6. Click **OK** to confirm.



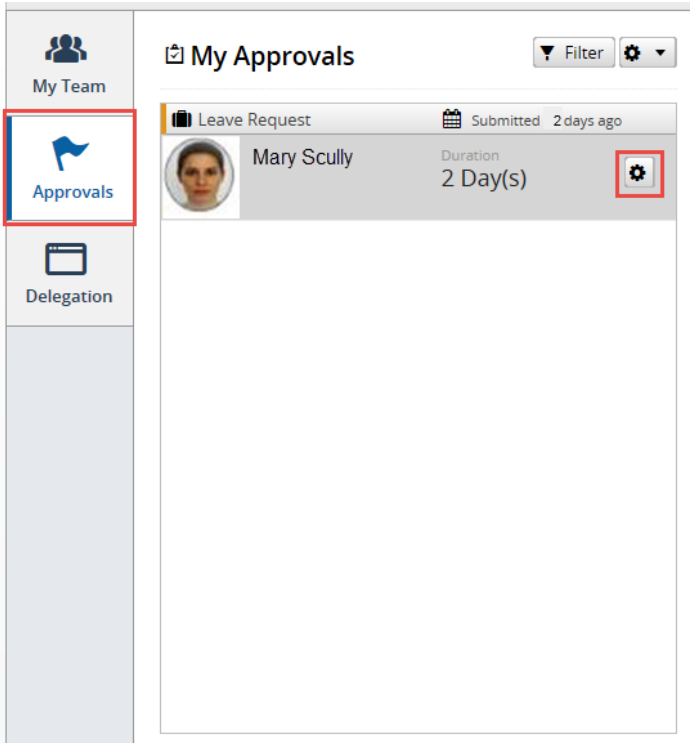
You are returned to the Team Scheduler screen to complete **Approve/Sign off** your Team's weekly hours.



Leave

Annual Leave Request

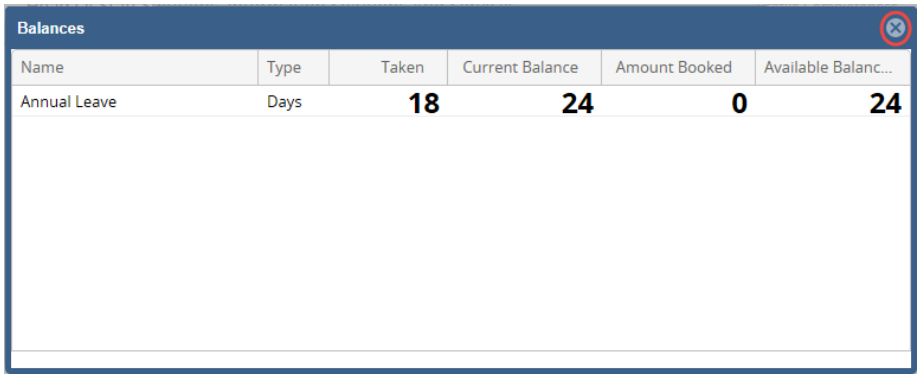
1. To Approve or Reject a leave request, from the My Team screen click **Approvals.**
   You will now see all pending Leave Requests**.** To Approve or Reject the Leave Request, click the cog wheel.



2. The Approve / Reject Leave Requests screen will now open. Full information regarding the leave request will now display.

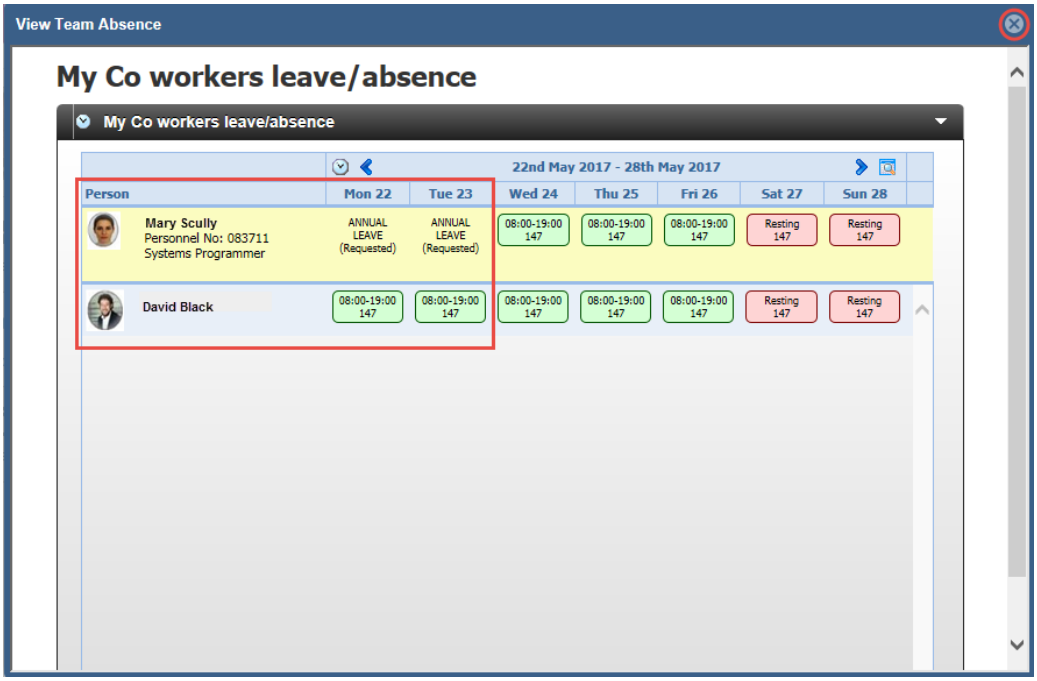
3. To view the Staff members leave balance, click the **magnifying glass** to view the staff members Leave Balance.

4. The Balances screen will open, showing you Leave **Taken** and **Available Balance.** Click the **x** to exit this screen.

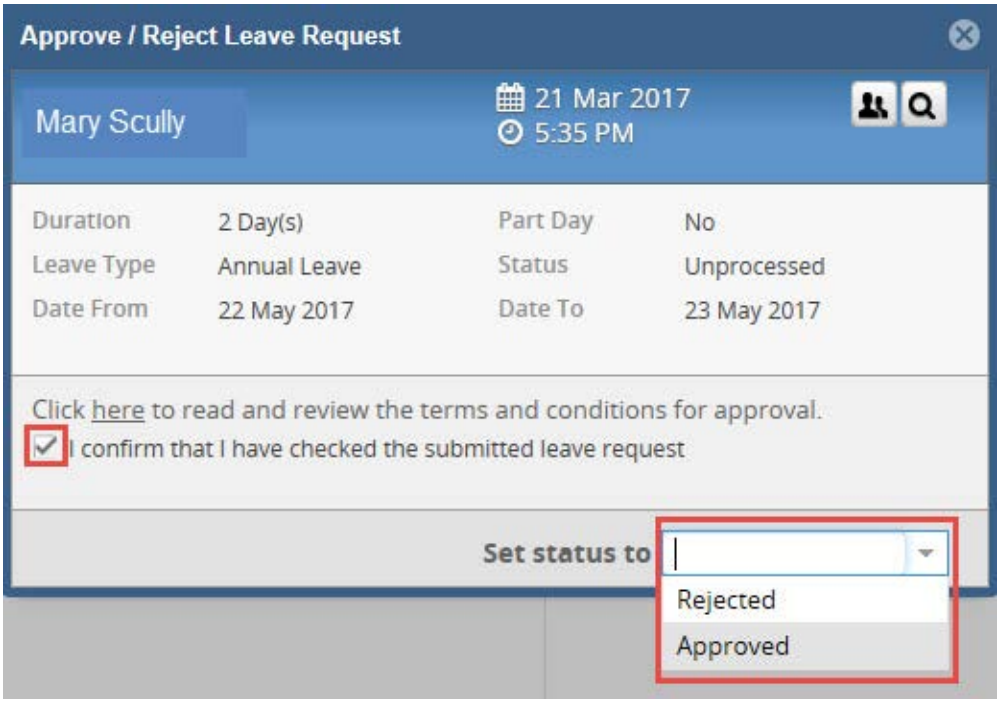


5. Click the group icon to view your **Team's leave /absence.**

6. The View Team Absence window will open. Here you can compare if another Team member has the same days already pending or booked. Click the **x** to exit this screen.



7. To Approve /Reject the requested leave, ensure the "**I confirm that I have checked the submitted leave request**" is ticked. Click the **Set status to** down arrow and select **Rejected** or **Approved.**



When you select Approve / Reject, please allow a few seconds for the application to process the request. Do not click Approve / Reject again

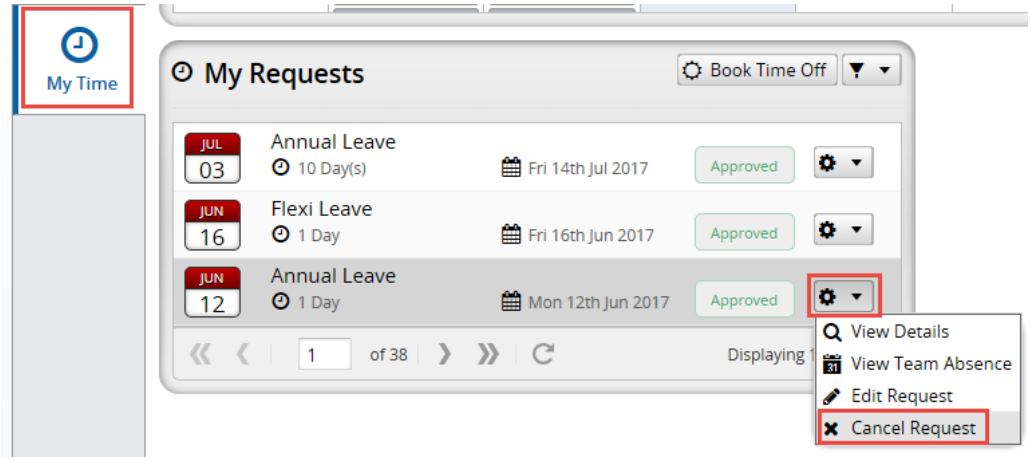
8. The Leave request has now been processed.

Cancel Leave

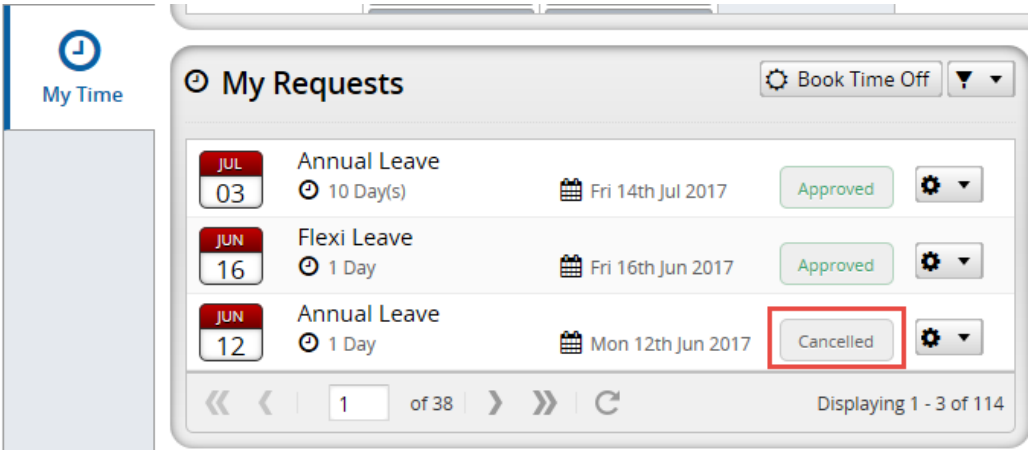
To cancel an **already approve Leave Request**; the employee must login to **their own Employee Self Service (ESS) Core Portal account**.

1. **The Employee** can go to **My Time**, and go to the Leave they want to cancel.

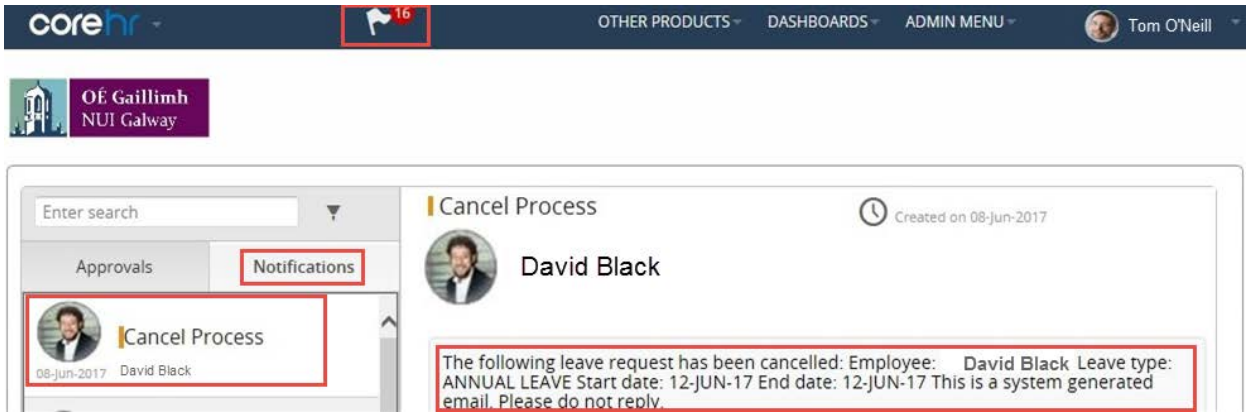
2. Click the **cog wheel**, from the drop down menu click **Cancel Request**.



3. **The Employee** will now see the leave has been cancelled.



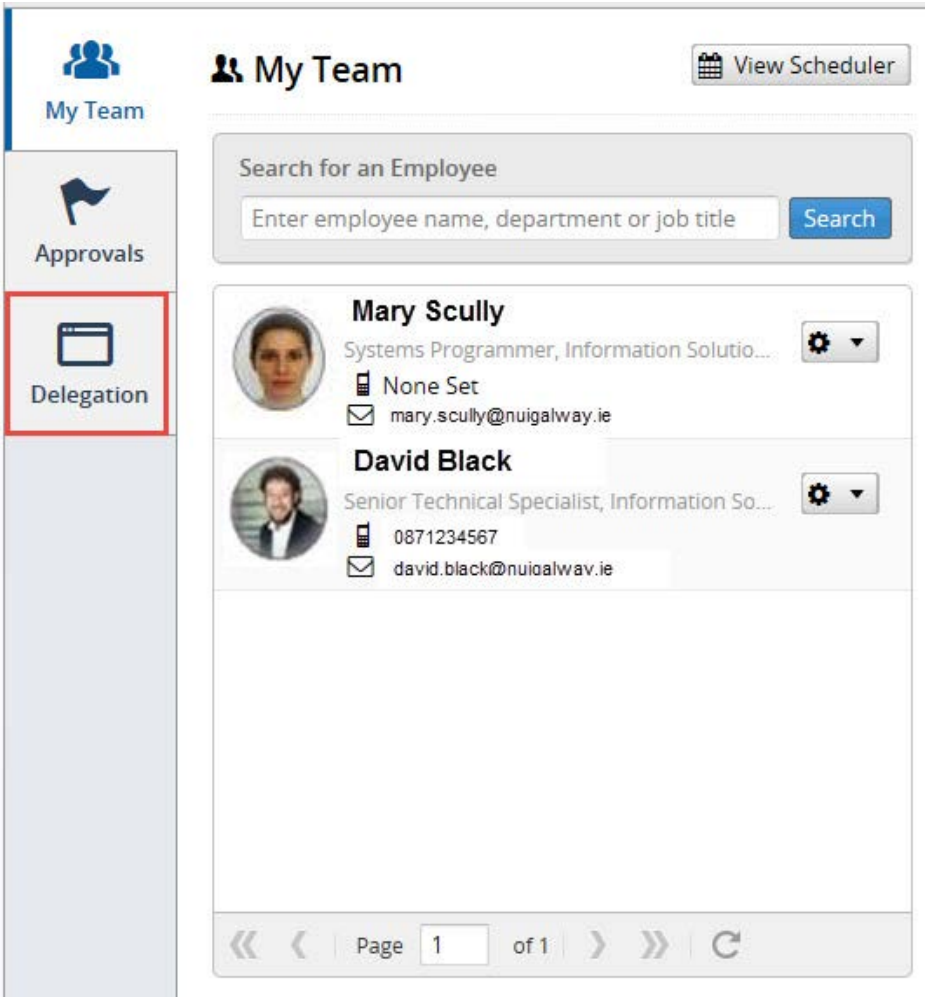
As Manager, you will see under your **Notifications** the **Cancel Process.** You will also receive an email to inform you that the Leave has been cancelled.



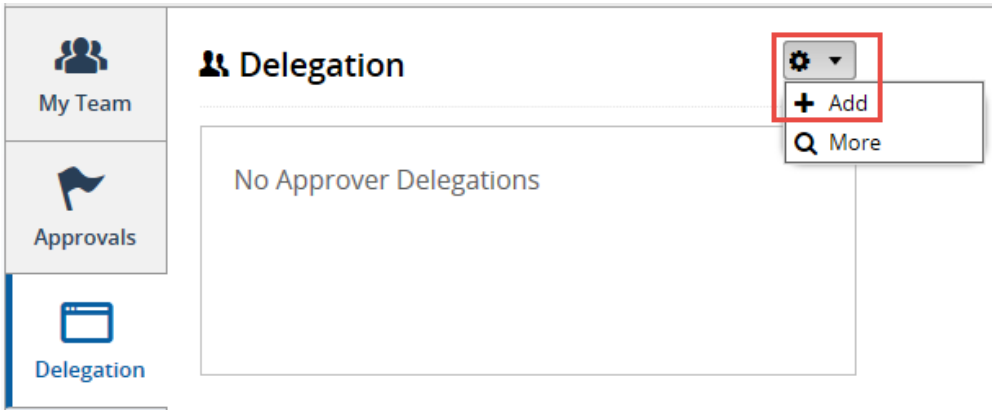
Delegate Approval/Sign off

While you are on leave, you can Delegate Approval/Sign off to another Approver.

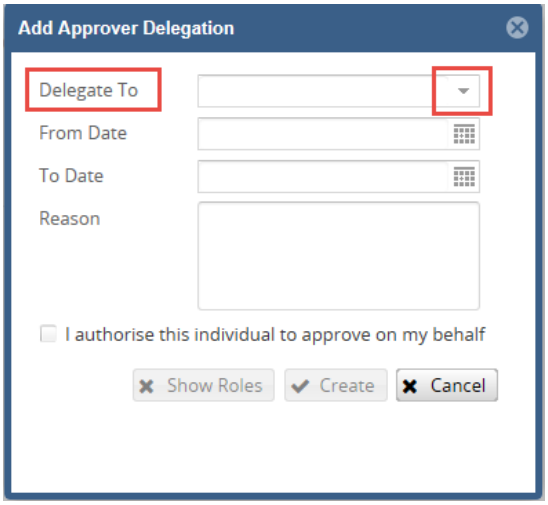
1. From the **Manager Dashboard** screen click on **Delegation.**



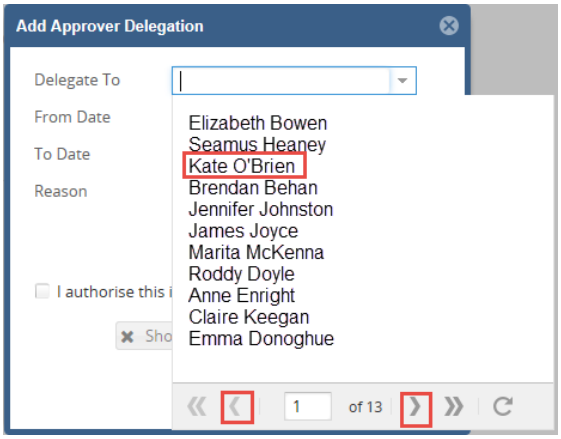
2. In the Delegation window, click the **cog wheel**, and click **Add.**



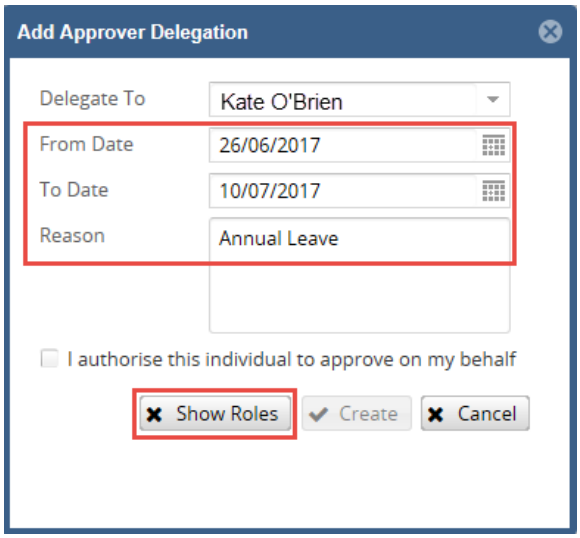
3. In the Add Approver Delegation window, click the **down arrow** to the right of **Delegate To**.



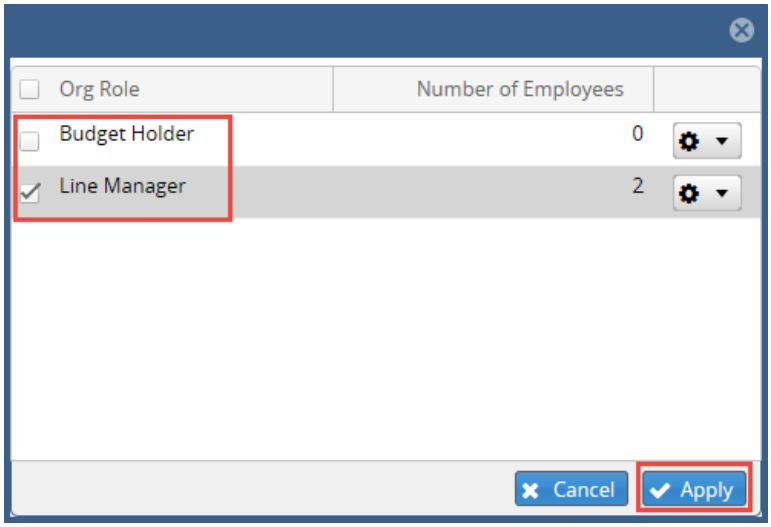
4. From the drop down list, and using the navigation arrows, select the Approver you wish to delegate to.



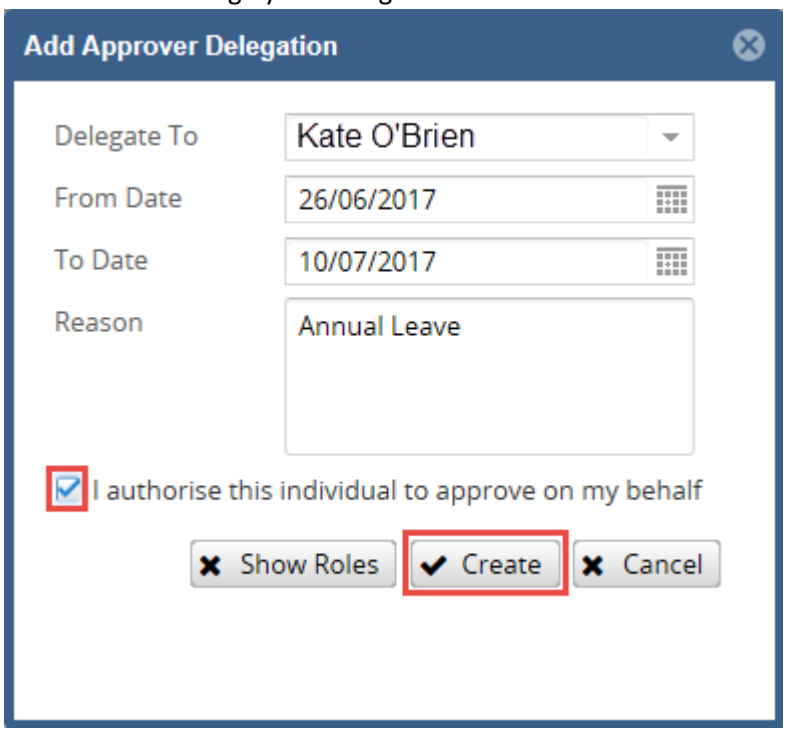
5. Once your Delegate is selected, you now need to select the **From** and **To** Date.
Give a reason why you require a Delegate for this time period.
Click **Show Roles.**



6. Select **Line Manager** or **Budget Holder**, which is relevant to your Delegate, and click **Apply.**



7. Click the check box "**I authorise this individual to approve on my behalf**".
Click **Create** to assign your Delegate.

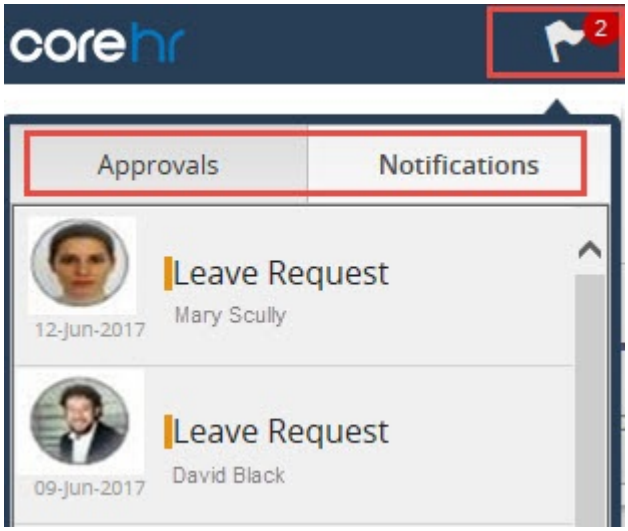


Notification Centre

The notification centre provides a Manager with a dashboard of their action items that they need to carry out on the system.

1. To access the Notification Centre go to the tool bar along the top of the page and click on the **Notification flag**.

2. The Notification Centre will open, and showing your actions (Approvals & Notifications).



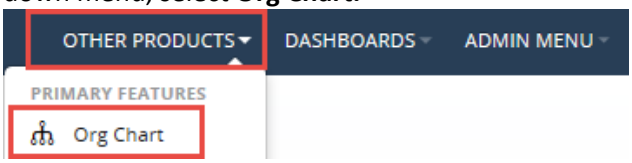
3. The Notification Flag will revert to zero when all notifications/approvals are opened.

> Approval & Notifications will clear down after 30 days.

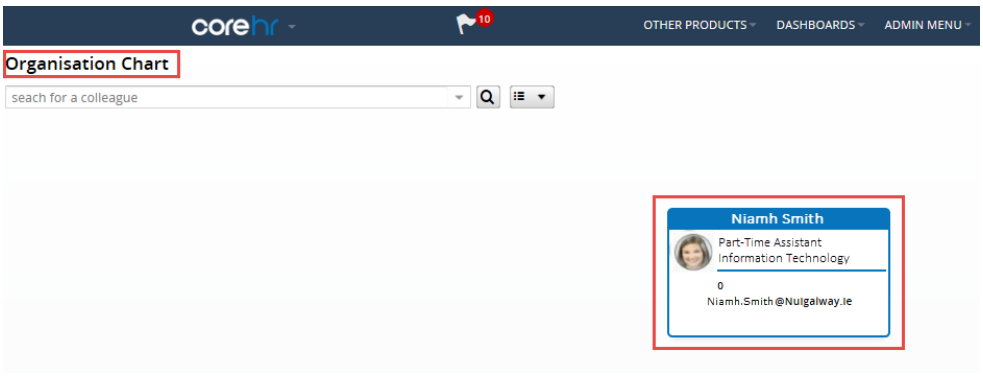
Organisation Chart

View Team on the Organisation Chart

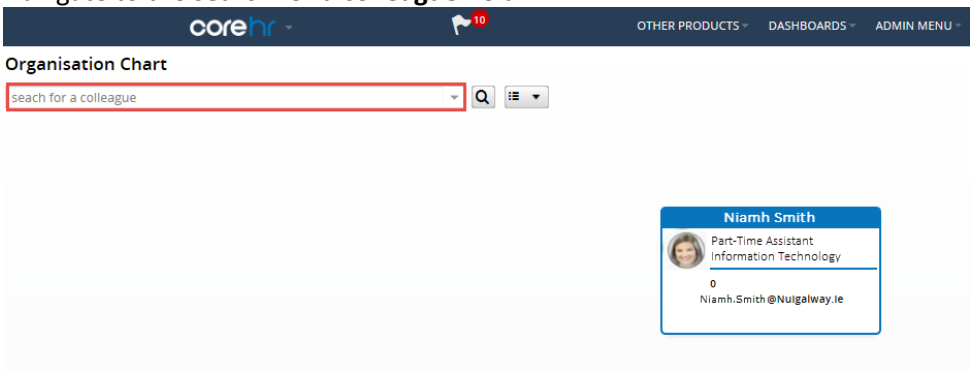
1. Go to the tool bar along the top of the page and click on **Other Products.** From the drop down menu, select **Org Chart.**



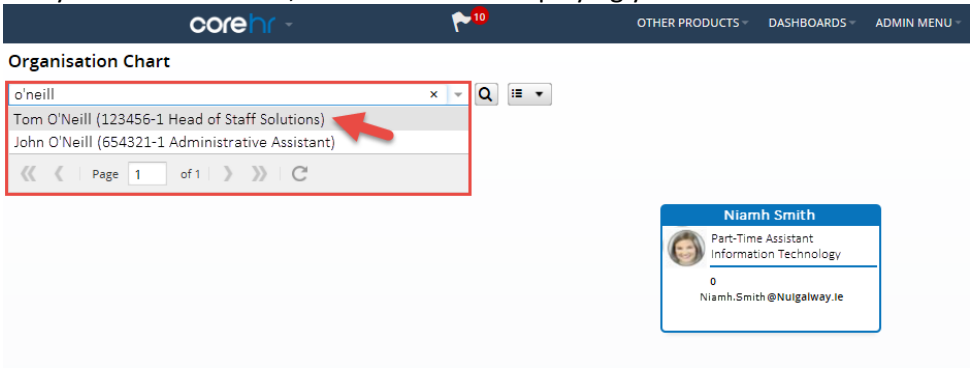
Upon first logging into the Organisational Chart, a staff member is populated into the Organisation Chart view by default.



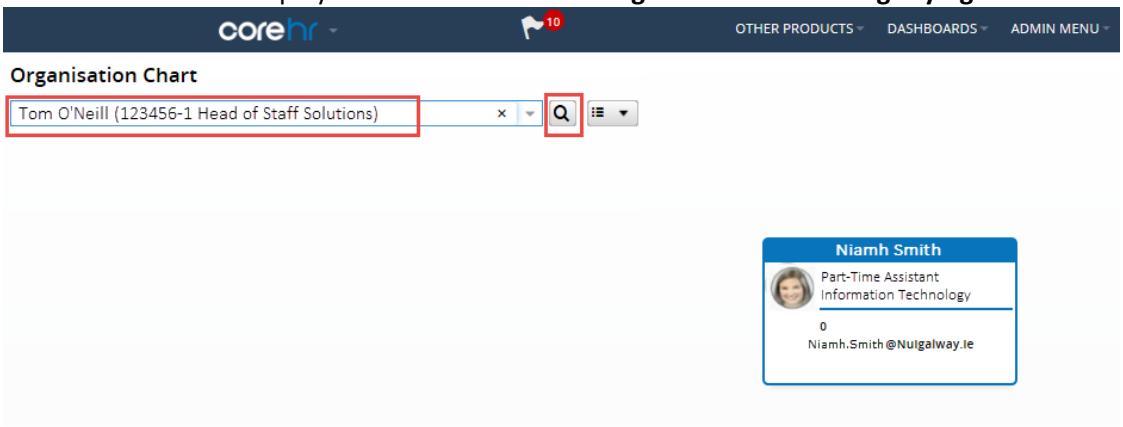
2. Navigate to the **search for a colleague** field.



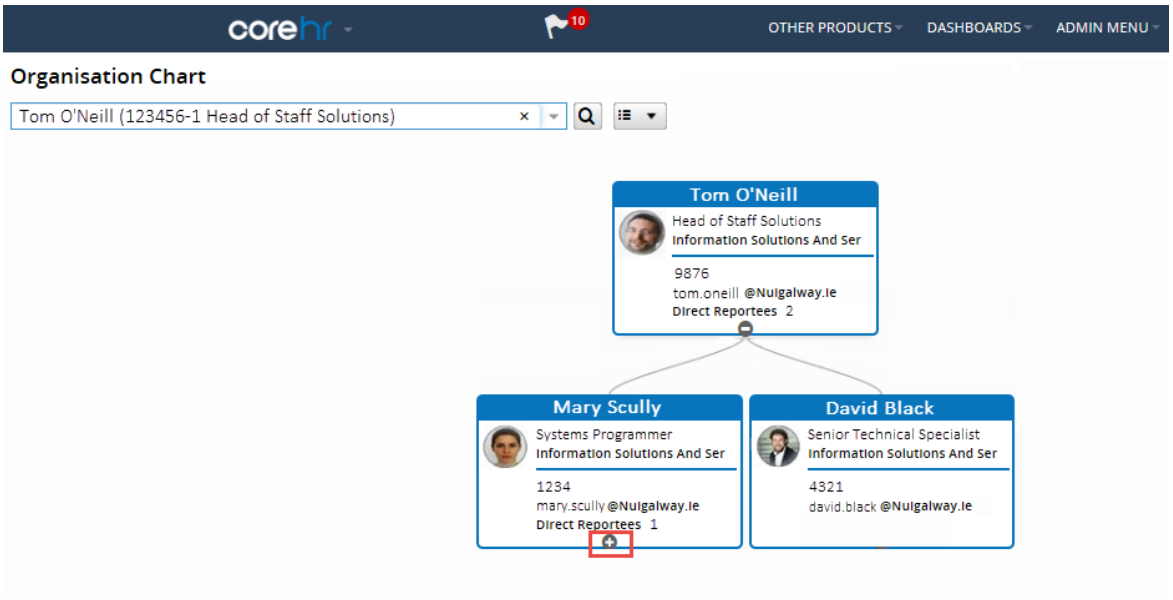
3. Start typing your name into this field. As you type, the drop down menu will start populating with matching results that narrow down as you type. When the field has narrowed down and your name is visible, click on the field displaying your name.



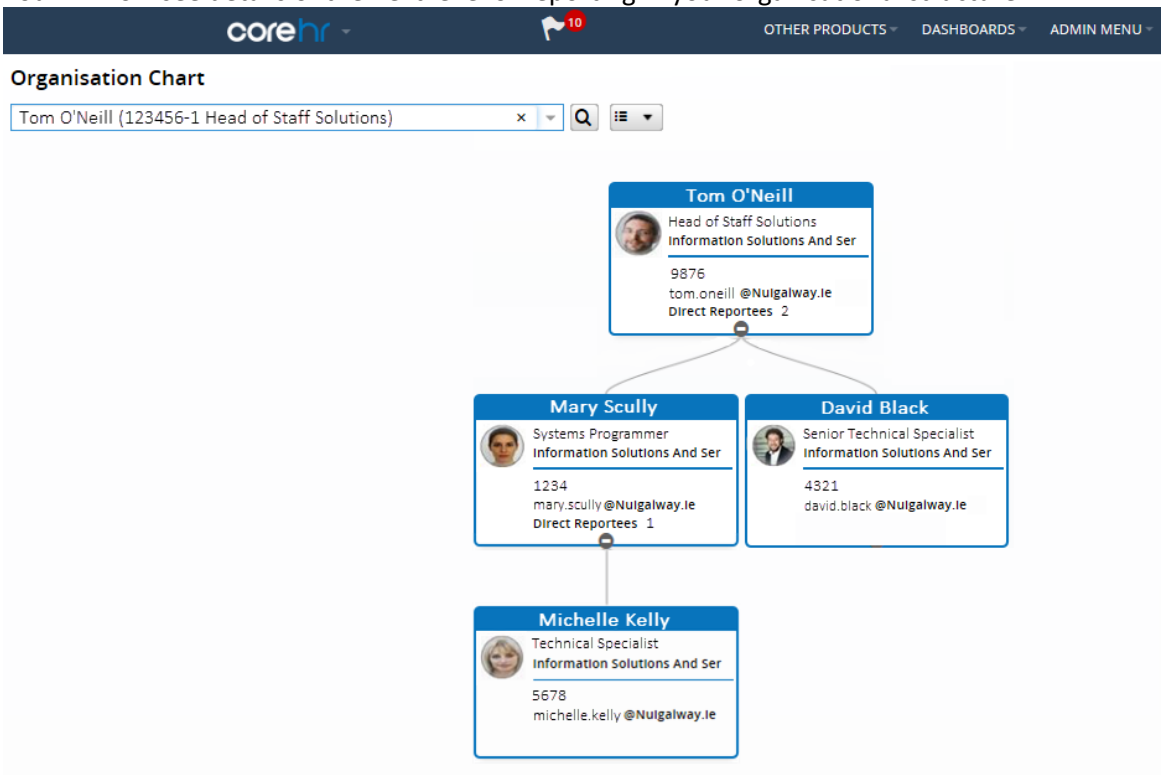
4. Your name will now display in the **search for a colleague** field. Hit the **Magnifying Glass** icon.



5. Your details will display on the top row. Team members that report directly to you will display on the row immediately beneath you. Should any of your team member have personnel that report to them, you will see a reference to the number of **Direct Reportees** that report to that member. To see details more details on that team member, select the **+** icon.

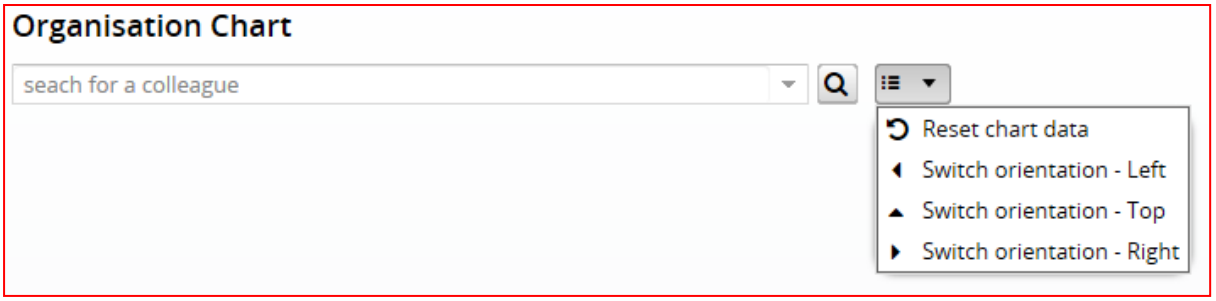


6. You will now see details of the next level of reporting in your organisational structure.



How to View your Team's Full Organisation Chart

Click on the dropdown and Switch orientation of the Organisation Chart to left or right then all the employees will fit onto the screen – see exception below.



If a manager has 100 or more employees reporting into them then it is not possible to represent this on the Organisation Chart as 100 is the maximum number of employees reporting into one manager that the chart can display.

Support

Where do I go for help?

Information Solutions & Services	Human Resources
➢ Campus Account login issues ➢ ESS Website unavailable	➢ Team members (Add/Remove) ➢ Unable to Approve/Sign off hours ➢ Delegate Access
Library & IT Service Desk Extension: 5777 Email: servicedesk@nuigalway.ie	Human Resources Extension: 2151 Email: hr@nuigalway.ie