



Manager Dashboard

Manager Dashboard – Generate Correspondence

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Overview

Managers can access correspondence through Manager Dashboard>My People>HR Dashboard area of the system.

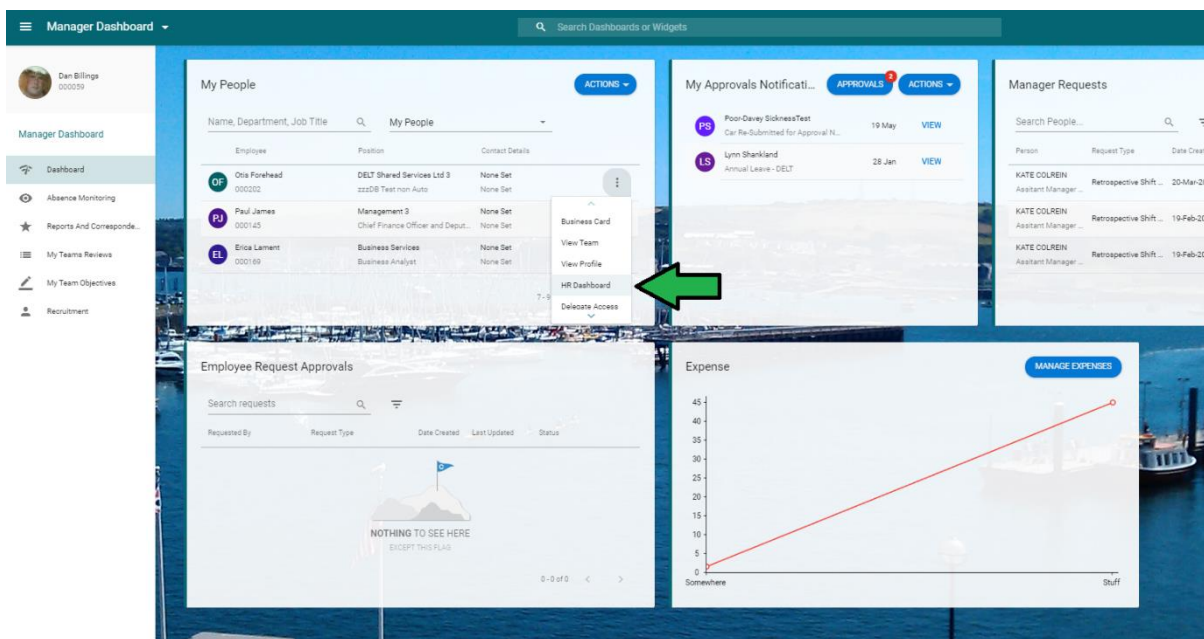
Managers have access to a suite of correspondence which they can generate and download in the Download Centre.

1. HR Dashboard – Generate Correspondence

1.1 HR Dashboard – Generate Correspondence

1. Go to Manager Dashboard, click onto the My People Widget and select the ellipsis next to the employee you want to produce the document for.

2. Select the HR Dashboard option.



3. This will then bring you to the following screen: click the actions button on the top right of the screen and choose Generate Document.



4. Managers can then choose the relevant template group and then the document from that group they want to generate for the employee they have chosen.

Template Group allows you to filter the templates into the groups that they are assigned to.

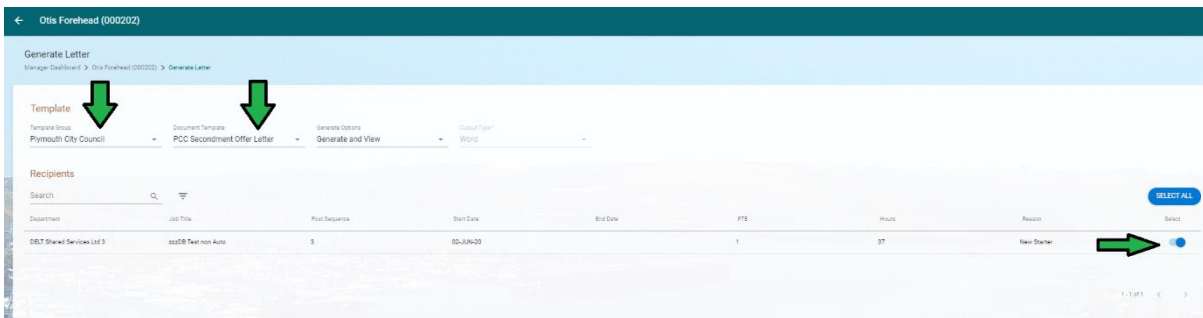
Document Template is where you select the template that you want to generate. (if no Template Group is selected, this will show all available templates).

Generate Options allows you to either **Generate and View** or **Generate and Upload**.

Generate and View – The generated documents will appear in the Download Centre widget for viewing. The documents will not be assigned to the employee’s record.

Generate and Upload – The generated documents will be **not** be viewable in the Download Centre widget. The documents **will** be uploaded to the employee’s record. (This option will only be available if the template has “Upload to CoreHR” enabled and has a “Document Type” selected).

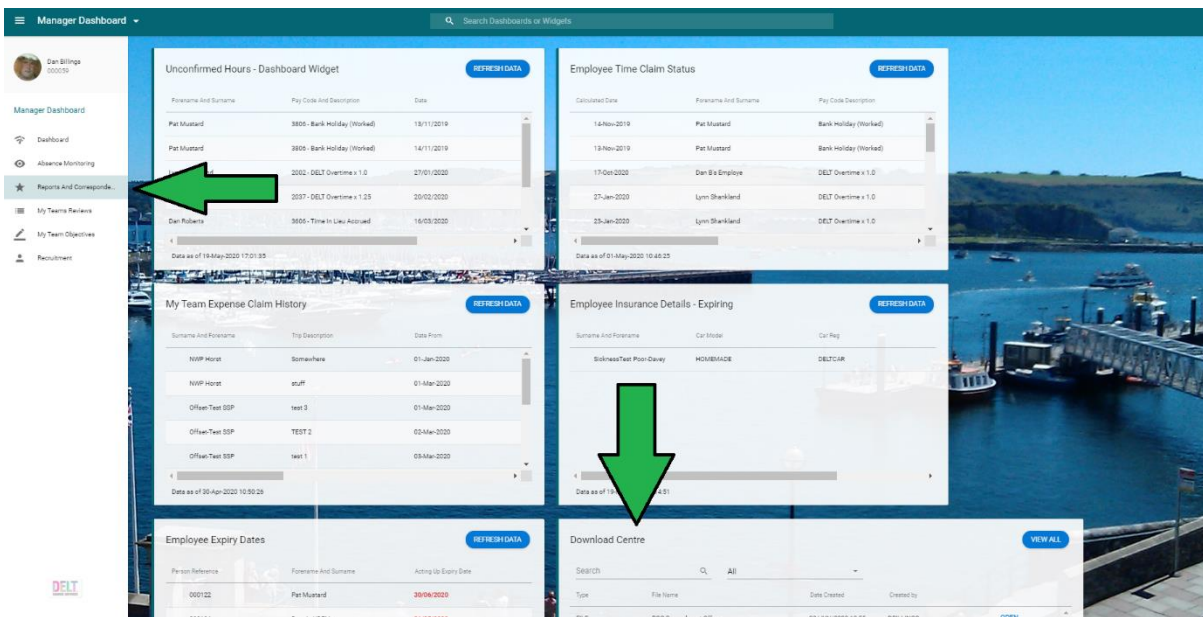
Select the job the document is relevant for (in this example the employee only has one job, but for employees with more than one job, they will have more options appear here) and then click generate.



This then generates the document; managers then need to open it from the Download Centre.

2.1 Download Centre

The Download Centre can be found on the ‘Reports and Correspondence tab of the manager dashboard.



On the Download centre find the document you have produced (this will appear at the top of list, but is date and time stamped to help you identify which one you want)

Download Centre [VIEW ALL](#)

Search Q All ▼

Type	File Name	Date Created	Created by	
FILE	PCC Secondment Offer ...	29/JUN/2020 10:55	DBILLINGS	OPEN
REPORT	Control/Exceptions Rep...	16/OCT/2019 12:23	DBILLINGS	DOWNLOAD
REPORT	Nett Pay Curr-Prev Exce... 10B Payroll 711	16/OCT/2019 12:06	DBILLINGS	DOWNLOAD
REPORT	Payroll Controls 10B Payroll 711	16/OCT/2019 12:06	DBILLINGS	DOWNLOAD

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Select 'Open' and then the manager can save this letter.