



Manager Dashboard

Manager Dashboard – My People Widget

16/09/2020

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Overview

My People Widget allows the Manager to view the following details.

Please note that each of these processes have been broken down into mini guides for ease of use. Links are embedded into this document to help you navigate to the correct guide: -

- View Employees Personal Information
 - View Business Cards
 - View Team
 - View Profile
 - HR Dashboard

- View Scheduler - Overview of Team Scheduler which includes full update of
 - Absences
 - Attendance
 - Leave Requests
 - Working Patterns
 - All Leave Requests
 - View & Authorise Timesheet Input (e.g. Overtime Claims)
 - View & Change Shift Change (Working patterns)
 - View & authorise Person Absence (Annual Leave; Sickness; Toil; Other Absences)


- View Social Onboarding
 - Total Items Incomplete
 - Incomplete Items by Person

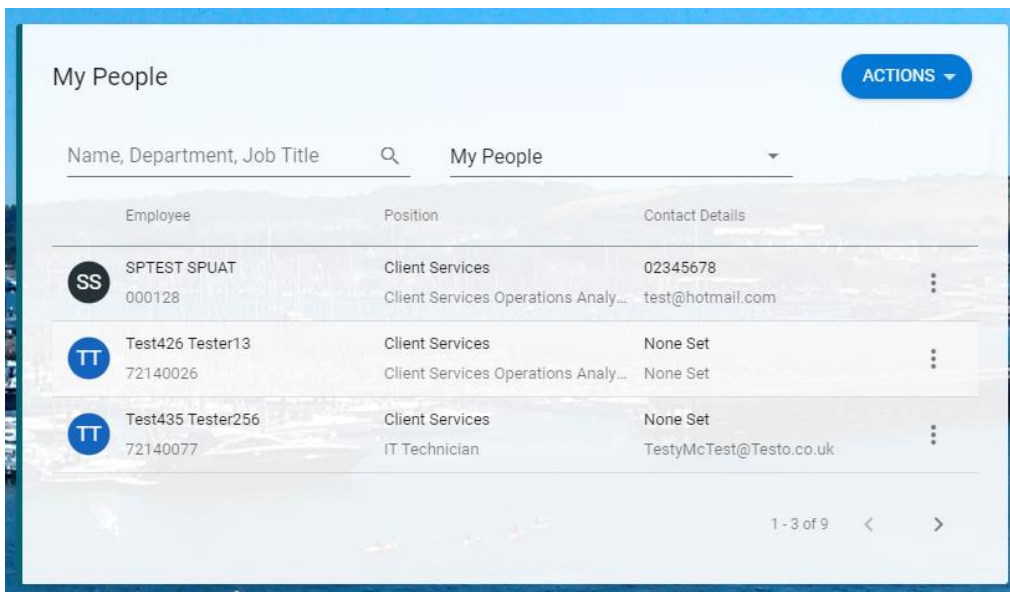
1. Manager Dashboard

1.1 My People Widget

1.1.1 My People Widget Navigation

My People Widget Navigation

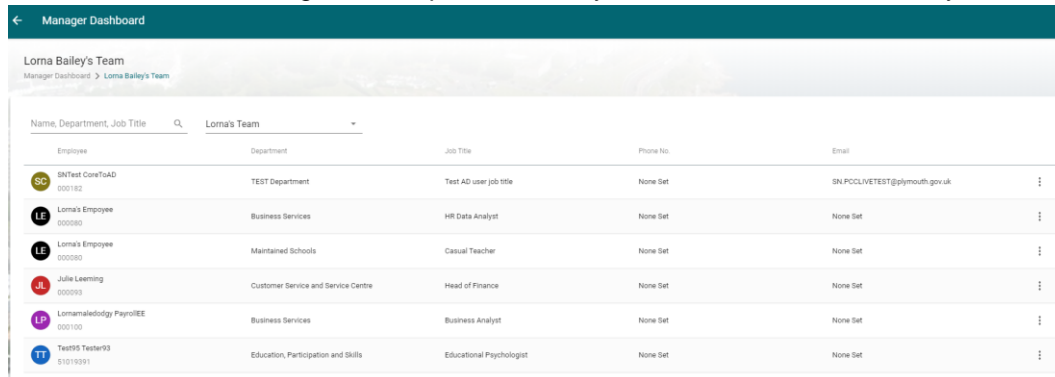
1. The My People Widget allows Managers view their Employees. You can simply type the Name, Department, Job Title into the search field and click the  icon. The system will return all employees that meet the criteria you entered. If there are multiple lines, scroll through the pages (indicated on the screen shot below. Once you have found the employee you wish to look at the following information is available to you.



- View Employees Schedule
- Timesheet Input (Overtime Claims etc) – See Manual
- Shift Change (Working Patterns) – See Manual
- Person Absences (Sickness; Annual Leave; Other Absences etc)

2. Once the Manager has selected their employee, they can click on the ellipses and a drop-down menu will appear, the Manager can select the following views: -

- View Team – Clicking this will open a view of your Team – this is a read only screen



| Name, Department, Job Title | Employee | Department | Job Title | Phone No. | Email |
|-----------------------------------|-----------------------------------|-------------------------------------|--------------------------|-----------|-------------------------------|
| SNTest CoreToAD 000182 | SNTest CoreToAD 000182 | TEST Department | Test AD user job title | None Set | SN.PCCLVETEST@plymouth.gov.uk |
| Loma's Employee 000080 | Loma's Employee 000080 | Business Services | HR Data Analyst | None Set | None Set |
| Loma's Employee 000080 | Loma's Employee 000080 | Maintained Schools | Casual Teacher | None Set | None Set |
| Julie Leeming 000093 | Julie Leeming 000093 | Customer Service and Service Centre | Head of Finance | None Set | None Set |
| Lomamaleology PayrollEE 000100 | Lomamaleology PayrollEE 000100 | Business Services | Business Analyst | None Set | None Set |
| Test95 Tester93 51019391 | Test95 Tester93 51019391 | Education, Participation and Skills | Educational Psychologist | None Set | None Set |

- View Profile – Clicking this will open Employee Details – Managers are able to view & update details on behalf of employees if necessary, however we encourage employees to update this information. All screens are fully auditable
 - Employee Details
 - Next of Kin
 - Known As
 - Contacts
 - Dependants
 - Documents
 - Contract – Manager can view
 - Contract Information
 - Salary Information; Salary History; Allowances History, Pay Profile
 - Post Characteristics 2
 - DBS (Post) Information
 - Post Characteristics
 - JE Information
 - PCC Regular Health Surveillance
 - Time Management
 - Balance Information
 - Leave Requests
 - Learning & Development
 - Continuous Development
 - Professional Bodies
 - Qualifications
 - Languages
 - Training Details
 - Other Information – View, update and create
 - User Defined Fields (DBS; Driver Details; Image Consent; Company Equipment)
 - Managers Requests (some examples.)
 - Hours Change
 - Career Break
 - Salary Change
 - HR Dashboard – Manager can view

- Key Information
- Contract Information
- Manager Information
- Cost Allocations
- Files (Attach files/documents)
- Onboarding
- Probation Details
- Balances
- Change Work Schedule – this is the only place a manager can access the Change Work Schedule
- Managers can also perform Actions from this page and are able to
 - View Employee Personnel Profile
 - Generate Documents

← Manager Dashboard

SPTTEST SPUAT (000128)
 Manager Dashboard > SPTTEST SPUAT (000128) ACTIONS +

SS Active Client Services Operations Analyst Start Date 01-Oct-2019 Payroll Status: Open for Processing

Key Information

General

| | | | | | |
|-----------|----------------|------------------------|------------------------------|------------------------------------|---------------------|
| Contracts | Title Mrs | Forename* SPTTEST | Surname* SPUAT | Middle Name | Known As SPTTEST |
| Manager | Initials SS | Ni Number SS123456D | Date of Birth 01-Jan-1981 | Age 39 Years, 3 Months, 14 Days | Retirement Date |

Service Details

| | | | |
|---|---|---|---|
| Date First Joined 01-Oct-2019 | Type Date | Override Start Date | Override End Date |
| Continuous Service Duration 0 Years, 6 Months, 14 Days | Continuous Service Started 01-Oct-2019 - 15-Apr-2020 | Total Length of Service 0 Years, 6 Months, 15 Days | Length of Service 0 Years, 6 Months, 15 Days |

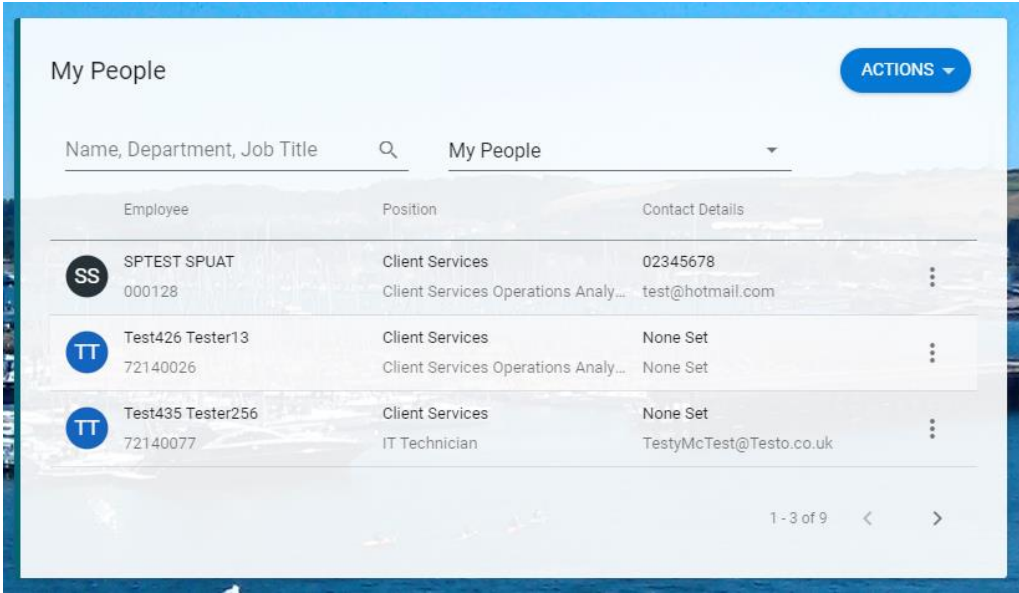
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2.1 HR Dashboard

2.1.1 HR Dashboard

HR Dashboard

From the Manager Dashboard access the 'My People' screen:



| Employee | Position | Contact Details |
|---|--|-------------------------------------|
|  SPTEST SPUAT 000128 | Client Services Client Services Operations Analy... | 02345678 test@hotmail.com |
|  Test426 Tester13 72140026 | Client Services Client Services Operations Analy... | None Set None Set |
|  Test435 Tester256 72140077 | Client Services IT Technician | None Set TestyMcTest@Testo.co.uk |

1. Use 'Search' to locate the employee.
2. Click the Ellipsis button, and choose 'HR Dashboard' - From this Screen you can: -
 - 2.1. View the Key Information of an Employee

Manager Dashboard

Test426 Tester13 (72140026)

Manager Dashboard > Test426 Tester13 (72140026)

TT Active Client Services Operations Analyst Start Date 01-Apr-2012 Payroll Status: Open for Processing

Key Information

General

| | | | | |
|----------|-----------|---------------|----------------------------|-----------------|
| Title | Forename* | Surname* | Middle Name | Known As |
| Mrs | Test426 | Tester13 | MidTest426 | |
| Initials | NI Number | Date of Birth | Age | Retirement Date |
| MC | NA111536C | 06-Aug-1963 | 56 Years, 7 Months, 4 Days | |

Service Details

| | | | |
|-----------------------------|----------------------------|-----------------------------|-----------------------------|
| Date First Joined | Type Date | Override Start Date | Override End Date |
| 01-Apr-2012 | | | |
| Continuous Service Duration | Continuous Service Started | Total Length of Service | Length of Service |
| 7 Years, 11 Months, 9 Days | 01-Apr-2012 - 10-Mar-2020 | 7 Years, 11 Months, 10 Days | 7 Years, 11 Months, 10 Days |

Work Permit

| | | | |
|--------------------|--------------------|------------------------|-------------------------|
| Work Permit Number | Work Permit Detail | Work Permit Issue Date | Work Permit Expiry Date |
| | | | |

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2.2. View Employees Contracts & Change Employee Contract Hours – to see how you Change

Test426 Tester13 (72140026)

Manager Dashboard > Test426 Tester13 (72140026)

TT Active Client Services Operations Analyst Start Date 01-Apr-2012 Payroll Status: Open for Processing

Key Information

Contracts

| Appointment ID | Status | Emp Status | Start Date | End Date | Substantive | Funding Expiry |
|----------------|---------|------------|-------------|----------|-------------|----------------|
| 300223-1 | Started | Permanent | 01-Apr-2012 | | 01-Apr-2012 | |

Amendments

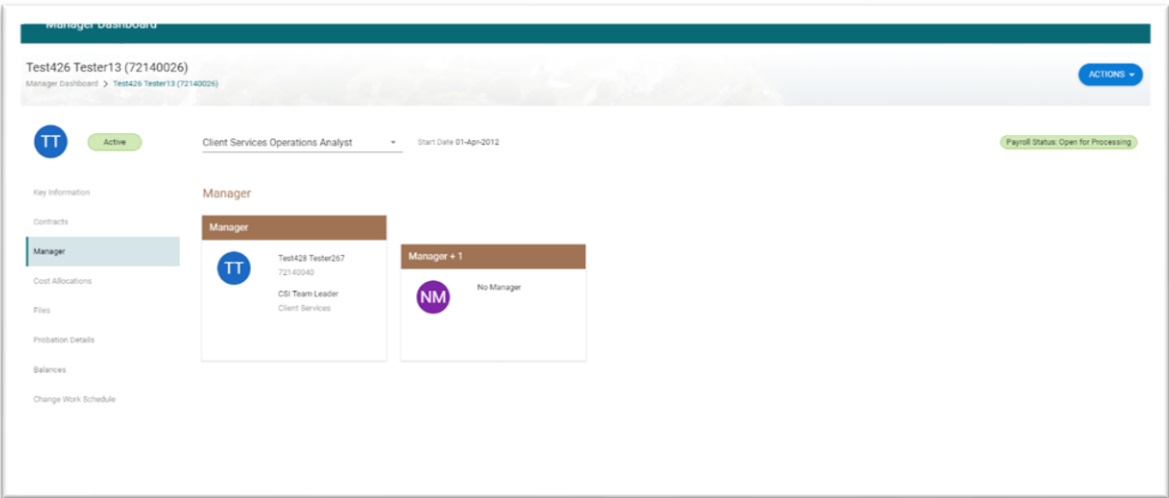
| Start Date | End Date | Target End Date | Post No | Post Sequence | Reason | Department | Hours | FTE | |
|-------------|----------|-----------------|---------|---------------|-----------|-----------------|-------|-----|----------------------|
| 01-Apr-2012 | | | 300223 | 1 | Data Load | Client Services | 22.2 | .6 | VIEW |

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[CHANGE CONTRACT HOURS](#)

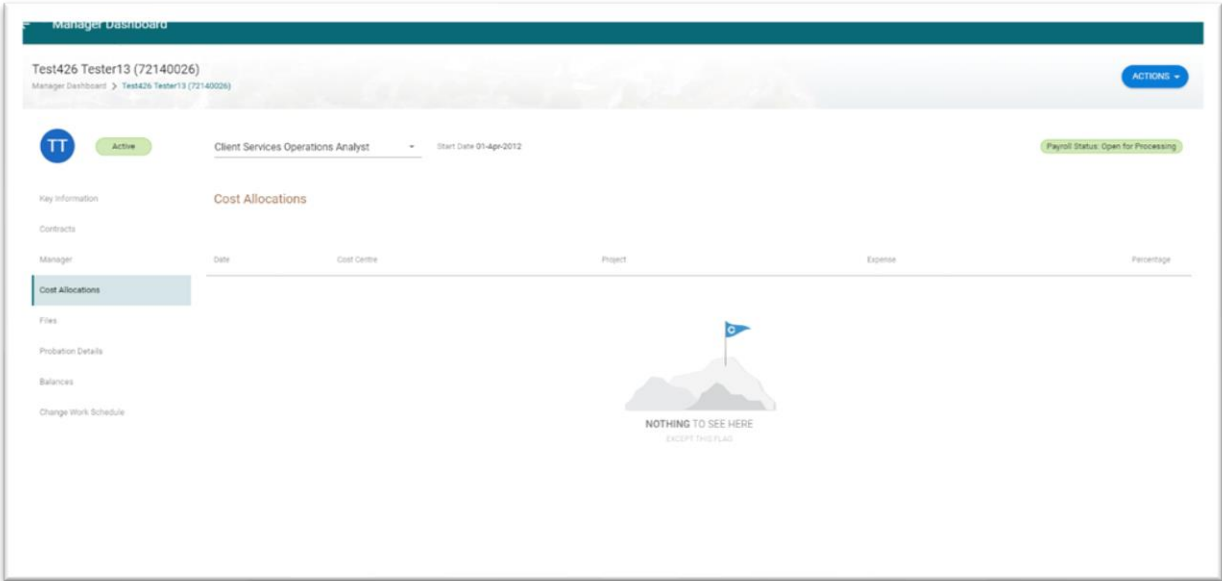
Employees Contract Hours please click on this link [Change Employees Hours](#)

2.3. View manager Information



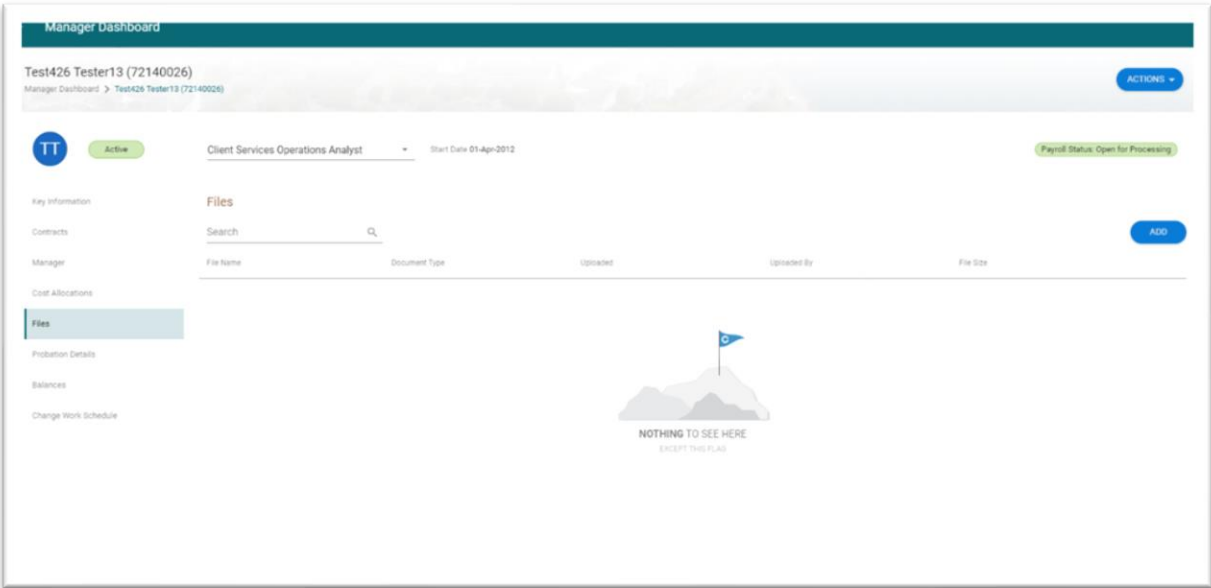
The screenshot shows the 'Manager Information' page for 'Test426 Tester13 (72140026)'. The page includes a navigation sidebar on the left with options like 'Key Information', 'Contacts', 'Manager', 'Cost Allocations', 'Files', 'Probation Details', 'Balances', and 'Change Work Schedule'. The main content area displays the employee's profile with a 'TT' icon, 'Active' status, and role 'Client Services Operations Analyst'. It also shows a 'Payroll Status: Open for Processing' indicator. Under the 'Manager' section, there are two cards: one for 'Test428 Tester267 (72140040)' with role 'CSI Team Leader' and 'Client Services', and another for 'Manager + 1' with role 'No Manager' and 'NM' icon.

2.4. View Cost Allocation



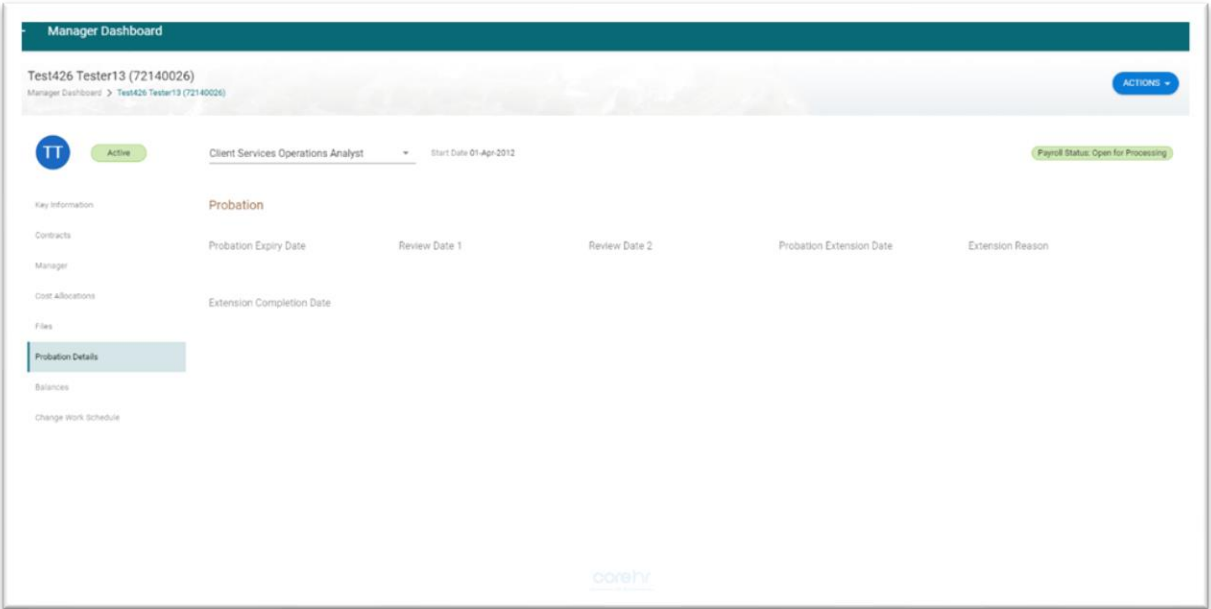
The screenshot shows the 'Cost Allocations' page for 'Test426 Tester13 (72140026)'. The page features a navigation sidebar on the left with options like 'Key Information', 'Contacts', 'Manager', 'Cost Allocations', 'Files', 'Probation Details', 'Balances', and 'Change Work Schedule'. The main content area displays the employee's profile with a 'TT' icon, 'Active' status, and role 'Client Services Operations Analyst'. It also shows a 'Payroll Status: Open for Processing' indicator. Below the profile, there is a table header for 'Cost Allocations' with columns: 'Date', 'Cost Centre', 'Project', 'Expense', and 'Percentage'. The table is currently empty, and a message at the bottom reads 'NOTHING TO SEE HERE EXCEPT THE FLAG' with a small flag icon.

2.5. View & Add Files



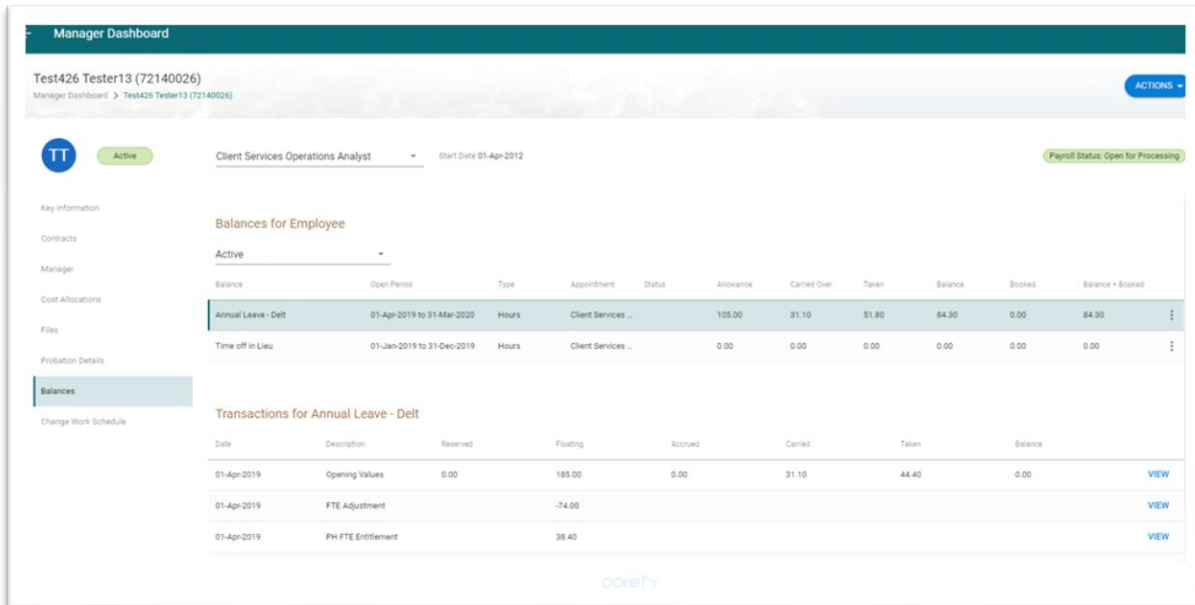
The screenshot shows the 'Manager dashboard' for 'Test426 Tester13 (72140026)'. The user is 'TT' (Active), a 'Client Services Operations Analyst' with a start date of '01-Apr-2012'. The 'Payroll Status' is 'Open for Processing'. The 'Files' section is active, showing a search bar and a table with columns: File Name, Document Type, Uploaded, Uploaded By, and File Size. The table is currently empty, displaying a 'NOTHING TO SEE HERE EXCEPT THIS FLAG' message with a flag icon.

2.6. View Probation Details



The screenshot shows the 'Manager Dashboard' for 'Test426 Tester13 (72140026)'. The user is 'TT' (Active), a 'Client Services Operations Analyst' with a start date of '01-Apr-2012'. The 'Payroll Status' is 'Open for Processing'. The 'Probation Details' section is active, showing a table with columns: Probation Expiry Date, Review Date 1, Review Date 2, Probation Extension Date, and Extension Reason. The table is currently empty, displaying a 'NOTHING TO SEE HERE EXCEPT THIS FLAG' message with a flag icon. The 'coreHR' logo is visible at the bottom.

2.7. View Balances



Manager Dashboard

Test426 Tester13 (72140026)
 Manager Dashboard > Test426 Tester13 (72140026) ACTIONS

TT Active Client Services Operations Analyst Start Date 01-Apr-2012 Payroll Status: Open for Processing

Key Information

Contracts

Manager

Cost Allocations

Files

Probation Details

Balances

Change Work Schedule

Balances for Employee

Active

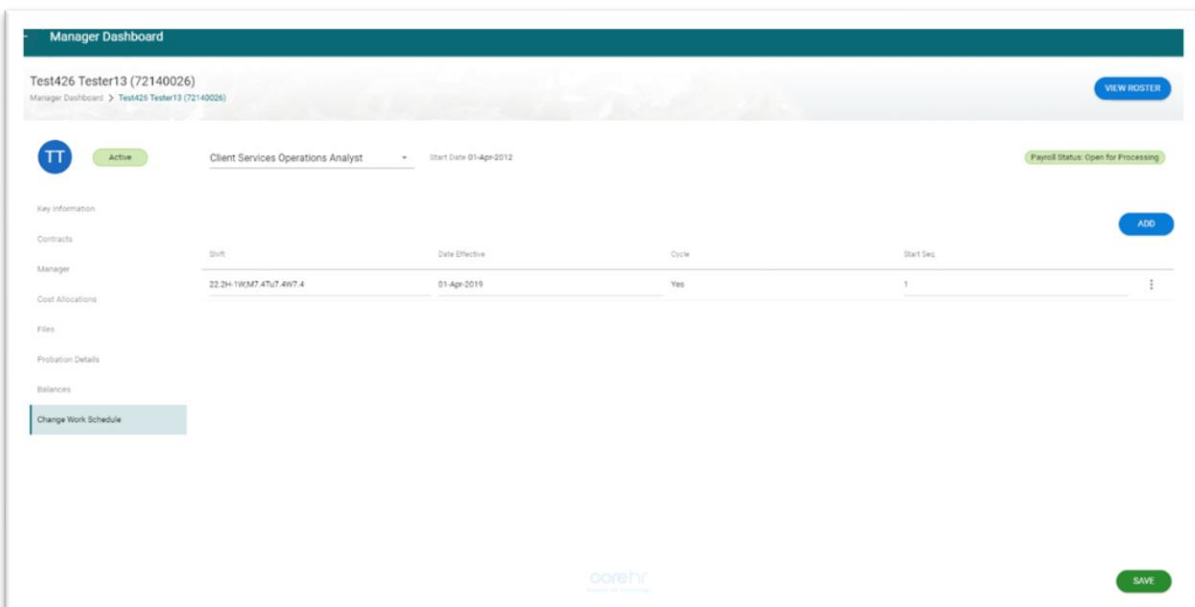
| Balance | Open Period | Type | Appointment | Status | Allowance | Carried Over | Taken | Balance | Booked | Balance + Booked |
|---------------------|----------------------------|-------|---------------------|--------|-----------|--------------|-------|---------|--------|------------------|
| Annual Leave - Delt | 01-Apr-2019 to 31-Mar-2020 | Hours | Client Services ... | | 105.00 | 31.10 | 51.80 | 84.30 | 0.00 | 84.30 |
| Time off in Lieu | 01-Jan-2019 to 31-Dec-2019 | Hours | Client Services ... | | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 | 0.00 |

Transactions for Annual Leave - Delt

| Date | Description | Reserved | Floating | Accrued | Carried | Taken | Balance |
|-------------|--------------------|----------|----------|---------|---------|-------|---------|
| 01-Apr-2019 | Opening Values | 0.00 | 185.00 | 0.00 | 31.10 | 44.40 | 0.00 |
| 01-Apr-2019 | FTE Adjustment | | -74.00 | | | | |
| 01-Apr-2019 | PH FTE Entitlement | | 38.40 | | | | |

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2.8. View and Change Work Schedule – to see how you change employees work schedule, please click on this link [Delt Manager Dashboard – Shift Change \(Working Pattern\)](#)



Manager Dashboard

Test426 Tester13 (72140026)
 Manager Dashboard > Test426 Tester13 (72140026) VIEW ROSTER

TT Active Client Services Operations Analyst Start Date 01-Apr-2012 Payroll Status: Open for Processing

Key Information

Contracts

Manager

Cost Allocations

Files

Probation Details

Balances

Change Work Schedule

ADD

| Shift | Date Effective | Clock | Start Sec |
|-----------------------|----------------|-------|-----------|
| 22:24-18M7:47U7:4W7:4 | 01-Apr-2019 | Yes | 1 |

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SAVE

3.1 My People Widget – View Scheduler Navigation

3.1.1 View Scheduler navigation

View Team Scheduler

1. The Team Scheduler allows Managers to Create/View/update/Delete the following for their whole team on the scheduler, managers are able to see their entire team at a glance all in one place.:

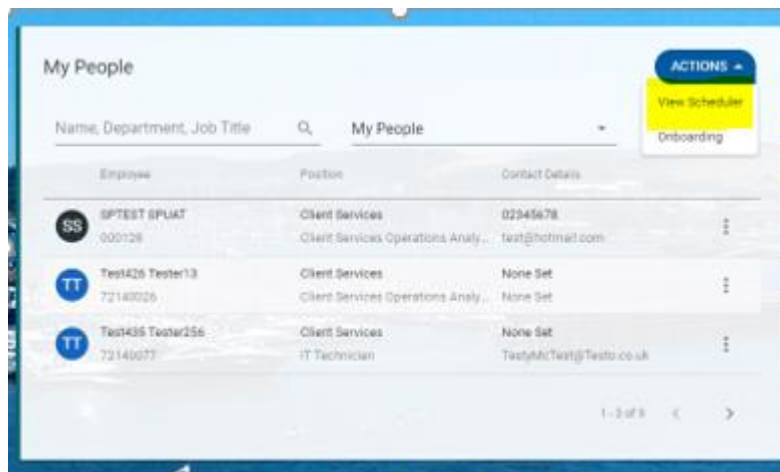
- Working patterns
- Leave
- Sickness
- Overtime
- Timesheet Input (Overtime Claims etc)
[Delt Manager Dashboard - Timesheets](#)

- Shift Change (Working Patterns) –
[Delt Manager Dashboard – Shift Change \(Working Pattern\)](#)

- Person Absences (Sickness; Annual Leave; Other Absences etc) –
[Delt Manager – Enter Person Absence \(Sickness\)](#)

2. Click on the Actions Button, the 'View Scheduler' option will appear.

3. Click on the 'View Scheduler' to carry out either of the tasks above. Click above links to view the mini guide



4.1 My People Widget – Social Onboarding

4.1.1 View Social Onboarding Data

Social Onboarding

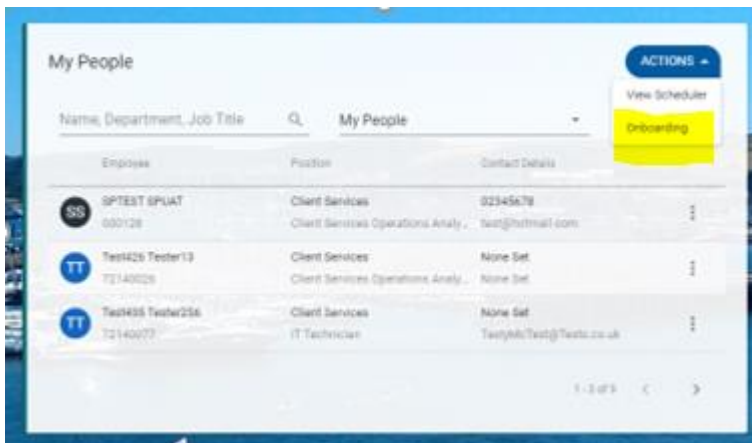
1. Social Onboarding is only available to Employees from specific Companies. If you do not see this access in your profile, it is because your company does not use this.

It requires the Employee to complete a series of checklists from their Employee Dashboard Module such as:-

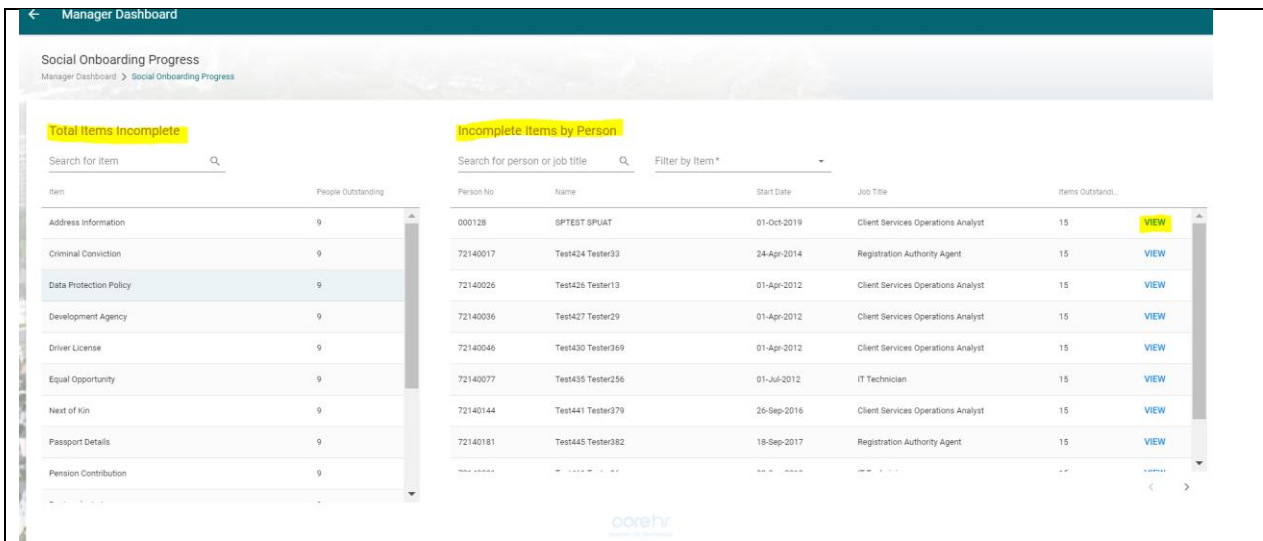
- Address Details
- Equal Opportunity
- Next of Kin
- And so on....

Managers Via the Manager Dashboard, are able to view the progress of these checklists.

2. Click on the Actions button in the My People Widget. A drop down list will appear. Select the Social Onboarding button.




3. You will be taken to the Onboarding Progress screen.



4. The screen is in two parts,

- The left hand side of the screen will give details on the 'Total Items Incomplete', and is a read only screen
- The right hand side will provide detail on 'Incomplete Items by Person'. The manager can then click on the view button and send the employee a message asking them to complete the checklist

items. The Manager is also able to click on the . The Manager will be requested to confirm they want to do this again. Completing All, removes the checklists from the Employees Social Onboarding in Employee Dashboard.

