



Manager Dashboard - Timesheet Management

Core Time

22/09/2020

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Overview

CoreHR allows users to view and maintain timesheet entry for approval, sign-off and transfer to Payroll.

This document outlines how: -

- Manager Views an employee's timesheet
- Manager Adds an employee's timesheet
- Manager Deletes an employee's timesheet
- Manager Updates an employee's timesheet

1. Manager to View Employees Timesheet

1.1. Manager View Timesheets

Login to the Manager Dashboard

1. Manager logs on to CorePortal.

2. Click My People>Action>View Scheduler.

3. Manager Dashboard opens and the *Team Scheduler* widget displays.

Team Scheduler

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th	Fri 10th	Sat 11th	Sun 12th
Jacob Brown Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Jessica Evans Operations Payroll	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	Resting	Resting
Jack Jones Operations Payroll	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	Resting	Resting
Emily Taylor Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Susan Wells HR Generalist H.R.							

View Timesheets (Manager)

To view timesheets for a team member:

1. On the 'Team Scheduler' widget, use the calendar to scroll to the relevant week.

Team Scheduler

2. Locate the relevant employee. Click the work week for the employee to display Team Scheduler options.
3. Click onto the calendar, please ensure you click into the blank area on the calendar (indicated by the Pink Arrow) you will see a drop-down menu appear
4. Click **Timesheet Input**.

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th
SPTEST SPUAT (000128) Client Services Operations Analyst Client Services				
Test426 Tester13 (72140026) Client Services Operations Analyst Client Services	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	Non Working Day
Test435 Tester256 (72140077) IT Technician Client Services	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)
Test427 Tester29 (72140036) Client Services Operations Analyst Client Services	Non Working Day	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)
Test424 Tester33 (72140017) Registration Authority Agent Client Services	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)

5. Employee's timesheets will display.

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
Overtime @ 1.00	M	2.00	1.00						3.00
Overtime @ 2.00	M				4.00				4.00
		2.00	1.00	0.00	4.00	0.00	0.00	0.00	7.00

6. (Optional) To view another team members' timesheets without exiting the screen, click the arrow to display all team members. You can then simply select name to view timesheets.

Employee Emily Taylor Employee No. []

Work Group LONDON - PAYROLL

Emily Taylor

Emily Taylor

Harry Williams

Jack Jones

Jacob Brown

Jessica Evans

Susan Wells

Timesheet Input

Workforce Management > Timesheet Input

Employee Jessica Evans Employee No. 500008

Work Group LONDON - PAYROLL

Jessica Evans

Show Unconfirmed

29-Apr-2019

Rejected Recode Required Approval Required Reason Code Required Narrative Attached

ADD

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
MATERNITY LEAVE	M	8.00	8.00	8.00	8.00	8.00			40.00

2. Manager to Add Timesheet

2.1. Steps to Complete – Manager Add Timesheets on behalf of Employee

Add Timesheets (Manager)

Managers can Add timesheets on behalf of their Employees; however, it is recommended that employees add their own timesheets and submit them to Managers for approval. This process should only be used, when Employees are unable to enter their own timesheets for a valid reason

1. Manager logs on to CorePortal.

2. Click My People>Action> View Scheduler.
3. Manager Dashboard opens and the *Team Scheduler* widget displays.

Team Scheduler

Search Employees

06-May-2019

Period: 201919

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th	Fri 10th	Sat 11th	Sun 12th
Jacob Brown Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Jessica Evans Operations Payroll	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	Resting	Resting
Jack Jones Operations Payroll	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	Resting	Resting
Emily Taylor Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Susan Wells HR Generalist H.R.							

Add Timesheets (Manager)

To add timesheets for a team member:





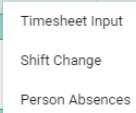

1. On the 'Team Scheduler' widget, use the calendar to scroll to the relevant week.

Team Scheduler



2. Locate the relevant employee. Click the work week for the employee to display Team Scheduler options.
3. Click onto the calendar, please ensure you click into the blank area on the calendar (indicated by the Pink Arrow) you will see a drop-down menu appear
4. Click **Timesheet Input**.

Search Employees

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th
 SPTEST SPUAT (000128) Client Services Operations Analyst Client Services				
 Test426 Tester13 (72140026) Client Services Operations Analyst Client Services	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	Non Working Day
 Test435 Tester256 (72140077) IT Technician Client Services	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)
 Test427 Tester29 (72140036) Client Services Operations Analyst Client Services	Non Working Day	 Timesheet Input Shift Change Person Absences	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)
 Test424 Tester33 (72140017) Registration Authority Agent Client Services	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)

5. Click **Add**
6. Enter the timesheet record:
 - a. Double check you are in the correct working week.
 - b. Select Pay code using the Pay Code list of values (if you start to type e.g. "Over" the list will restrict and only show Pay Codes that begin with "Over" i.e. Overtime
 - c. Click the cell of the relevant day and enter value. E.g. 4 hours overtime
 - d. Tab or press ENTER/RETURN.
 - e. Repeat for all other days.
 - f. (Optional) To add reason code/narrative, click corresponding ellipsis and click **Add Reason** and/or **Add/View Comments**.
 - g. Click **Save**.

Timesheet Input
Workforce Management > Timesheet Input

Employee Harry Williams Employee No. 530003
Work Group LONDON - PAYROLL
Harry Williams Show Unconfirmed

06-May-2019

Rejected Recode Required Approval Required Reason Code Required Narrative Attached

Pay Code	Entry Type	Mon 05h	Tue 7h	Wed 8h	Thu 9h	Fri 10h	Sat 11h	Sun 12h	Total
Overtime @ 1.50	M	4.00							4.00
Overtime @ 1.00	M		2.00	2.00					4.00
		4.00	2.00	2.00	0.00	0.00	0.00	0.00	8.00

SAVE

- Timesheets are saved. Repeat for additional Pay Codes.
- (Optional) To add timesheets for additional employees without exiting the screen, click the arrow to display all team members. Select name to view timesheets.

Harry Williams

- Emily Taylor
- Harry Williams
- Jack Jones
- Jacob Brown
- Jessica Evans
- Susan Wells

- Once the Timesheets are saved. Manager will need to follow the Timesheet Transfer guide to authorise. [Timesheet Transfer Guide](#)

3. Manager to Delete Timesheet

3.1. Steps to Complete – Manager Delete Timesheet

Login to the Manager Dashboard

1. Manager logs on to CorePortal.

The screenshot shows the Manager Dashboard interface. On the left is a navigation menu with options like Dashboard, Absence Monitoring, Reports And Correspondence, My Teams Reviews, My Team Objectives, and Recruitment. The main area is divided into three sections: 'My People' (listing employees like SPTST SPUAT, Test1426 Tester13, and Test1435 Tester256), 'My Approvals Notifications' (showing an approval for Test1435 Tester256), and 'Manager Requests'.

2. Click My People>Action> *View Scheduler*.

3. Manager Dashboard opens and the *Team Scheduler* widget displays.

Team Scheduler

The Team Scheduler widget displays a weekly grid for the period 06-May-2019. It lists team members and their scheduled times, including maternity leave for Jessica Evans.

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th	Fri 10th	Sat 11th	Sun 12th
Jacob Brown Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Jessica Evans Operations Payroll	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	Resting	Resting
Jack Jones Operations Payroll	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	Resting	Resting
Emily Taylor Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Susan Wells HR Generalist H.R.							

Delete Timesheets (Manager)

To delete timesheets for a team member:

1. On the 'Team Scheduler' widget, use the calendar to scroll to the relevant week.

Team Scheduler



2. Locate the relevant employee. Click the work week for the employee to display Team Scheduler options.
3. Click onto the calendar, please ensure you click into the blank area on the calendar (indicated by the Pink Arrow) you will see a drop-down menu appear
4. Click **Timesheet Input**.

Search Employees

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th
Jacob Brown Payroll Assistant Payroll	09:00 - 14:00	09:00 - 18:00	09:00 - 18:00	09:00 - 14:00
SS SPTEST SPUAT (000128) Client Services Operations Analyst Client Services				
TT Test426 Tester13 (72140026) Client Services Operations Analyst Client Services	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	Non Working Day
TT Test435 Tester256 (72140077) IT Technician Client Services	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)
TT Test427 Tester29 (72140036) Client Services Operations Analyst Client Services	Non Working Day	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)
TT Test424 Tester33 (72140017) Registration Authority Agent Client Services	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)

A pink arrow points to the blank area on the calendar for Test426 Tester13. A dropdown menu is visible over the calendar with options: Timesheet Input, Shift Change, and Person Absences.

5. Employee's timesheets display.

Timesheet Input

Workforce Management > Timesheet Input

Employee Emily Taylor Employee No. 500005 29-Apr-2019

Work Group LONDON - PAYROLL

Emily Taylor Show Unconfirmed

Rejected Recode Required Approval Required Reason Code Required Narrative Attached

ADD

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
Overtime @ 1.00	M	2.00	1.00						3.00
Overtime @ 2.00	M				4.00				4.00
		2.00	1.00	0.00	4.00	0.00	0.00	0.00	7.00

6. To delete the Pay Code (e.g. remove "Overtime @ 1.50")
 - a. Locate the Pay Code to be deleted.
 - b. Click the ellipsis.
 - c. Click **Delete**.
 - d. Click **Yes** to confirm.

7. Click **Save**.

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total	
Overtime @ 1.00	M	2.00	1.00						3.00	⋮
Overtime @ 2.00	M				4.00				4.00	⋮
		2.00	1.00	0.00	4.00	0.00	0.00	0.00		

Approve Hours
 Reject Hours
 Add Reason
 Add/View Comments
Delete

SAVE

Note:

Deleting a Pay Code using the above process will delete the entire row. To delete the Pay Code for a single day only (and multiple days entered), best practice is to:

- Click into the value cell for the Pay Code/Day
- Delete the value only.
- Click **Save**.

8. (Optional) To delete another team members' timesheets without exiting the screen, click the arrow to display all team members. Select name to view timesheets.

Employee Emily Taylor Employee No. _____

Work Group LONDON - PAYROLL

Emily Taylor

- Emily Taylor
- Harry Williams
- Jack Jones
- Jacob Brown
- Jessica Evans
- Susan Wells

Timesheet Input

Workforce Management > Timesheet Input

Employee Jessica Evans Employee No. 500008 29-Apr-2019

Work Group LONDON - PAYROLL

Jessica Evans Show Unconfirmed

● Rejected
 ● Recode Required
 ● Approval Required
 ● Reason Code Required
 ● Narrative Attached

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total	
MATERNITY LEAVE	M	8.00	8.00	8.00	8.00	8.00			40.00	⋮

4. Manager to Update Timesheet

4.1. Steps to Complete – Manager to Update Timesheets

Login to the Manager Dashboard

1. Manager logs on to CorePortal.

The screenshot shows the Manager Dashboard with a sidebar on the left containing navigation options like Dashboard, Absence Monitoring, Reports And Correspondence, My Teams Reviews, My Team Objectives, and Recruitment. The main content area includes:

- My People:** A table listing employees with columns for Name, Department, Job Title, Position, and Contact Details.

Name, Department, Job Title	Position	Contact Details
SPEST SPUAT 000128	Client Services	02345678 Client Services Operations Analy... test@hotmail.com
Test426 Tester13 72140026	Client Services	None Set Client Services Operations Analy... None Set
Test435 Tester256 72140077	Client Services	None Set IT Technician TestyMcTest@Testo.co.uk
- My Approvals:** A notification for 'Test435 Tester256 (72140077) FLEXI (PAID)' dated 09 Mar, with a 'VIEW' button.
- Manager Requests:** A section with a search bar and a table for tracking requests.

Person	Request Type	Date Created	Date Submitted	Status

2. Click My People>Action> ViewScheduler.
3. Manager Dashboard opens and the *Team Scheduler* widget displays.

The Team Scheduler widget displays a weekly view for 06-May-2019. It lists team members and their schedules across the days of the week (Mon 6th to Sun 12th). The period is set to 2019.

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th	Fri 10th	Sat 11th	Sun 12th
Jacob Brown Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Jessica Evans Operations Payroll	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE - 08:00	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	09:00 - 18:00 MATERNITY LEAVE	Resting	Resting
Jack Jones Operations Payroll	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	09:00 - 17:00	Resting	Resting
Emily Taylor Payroll Assistant Payroll	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	09:00 - 18:00	Resting	Resting
Susan Wells HR Generalist H.R.							

View Timesheets (Manager)

To view timesheets for a team member:

1. On the 'Team Scheduler' widget, use the calendar to scroll to the relevant week.

Team Scheduler

2. Locate the relevant employee. Click the work week for the employee to display Team Scheduler options.
3. Click onto the calendar, please ensure you click into the blank area on the calendar (indicated by the Pink Arrow) you will see a drop-down menu appear
4. Click **Timesheet Input**.

Team Member	Mon 6th	Tue 7th	Wed 8th	Thu 9th
SPTST SPUAT (000128) Client Services Operations Analyst Client Services				
Test426 Tester13 (72140026) Client Services Operations Analyst Client Services	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	Non Working Day
Test435 Tester256 (72140077) IT Technician Client Services	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s) OT1.25 - 04:00	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)
Test427 Tester29 (72140036) Client Services Operations Analyst Client Services	Non Working Day	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)	7 Hour(s) 24 Min(s)
Test424 Tester33 (72140017) Registration Authority Agent Client Services	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)	7 Hour(s) 30 Min(s)

5. Employee's timesheets display.

Pay Code	Entry Type	Mon 28th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
Overtime @ 1.00	M	2.00	1.00						3.00
Overtime @ 2.00	M			4.00					4.00
		2.00	1.00	0.00	4.00	0.00	0.00	0.00	7.00

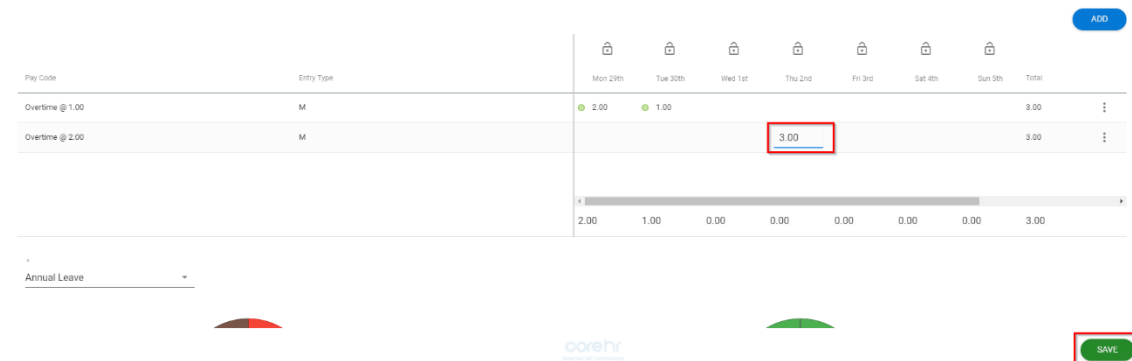
6. To update the Pay Code (e.g. Change "Overtime @ 1.50" to "Overtime @ 2.00":
 - a. Click the Pay Code cell to be updated.

- b. Search for and select the replacement Pay Code.
- 7. Click **Save**.



Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
Overtime @ 1.00	M	2.00	1.00						3.00
Overtime @ 2.00	M				2.00				2.00
		2.00	1.00	0.00	0.00	0.00	0.00	0.00	3.00

- 8. To update the value (e.g. change 2hrs to 3hrs):
 - a. Click the value cell to be updated.
 - b. Enter the new value.
- 9. Click **Save**.



Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
Overtime @ 1.00	M	2.00	1.00						3.00
Overtime @ 2.00	M				3.00				3.00
		2.00	1.00	0.00	0.00	0.00	0.00	0.00	3.00

Note:

Updating a Pay Code will update the Pay Code for the entire row. To update the Pay Code for a single day (and multiple days entered), best practice is to:

1. Use step 8 above to update the value to 0 for the existing record for the relevant day only.
2. Add a new row for the new Pay Code with corresponding value.
3. Save.

- 10. (Optional) To view another team members' timesheets without exiting the screen, click the arrow to display all team members. Select name to view timesheets.

Employee Emily Taylor
Employee No.

Work Group LONDON - PAYROLL

Emily Taylor
⌵

- Emily Taylor
- Harry Williams
- Jack Jones
- Jacob Brown
- Jessica Evans
- Susan Wells

Timesheet Input

Workforce Management > Timesheet Input

ACTIONS ⌵

Employee Jessica Evans Employee No. 50008

Work Group LONDON - PAYROLL

Jessica Evans Show Unconfirmed

29-Apr-2019

● Rejected ● Recode Required ● Approval Required ● Reason Code Required ● Narrative Attached

ADD

Pay Code	Entry Type	Mon 29th	Tue 30th	Wed 1st	Thu 2nd	Fri 3rd	Sat 4th	Sun 5th	Total
MATERNITY LEAVE	M	8.00	8.00	8.00	8.00	8.00			40.00

