



**Ulster  
University**

**Annual Leave**

**CoreHR**



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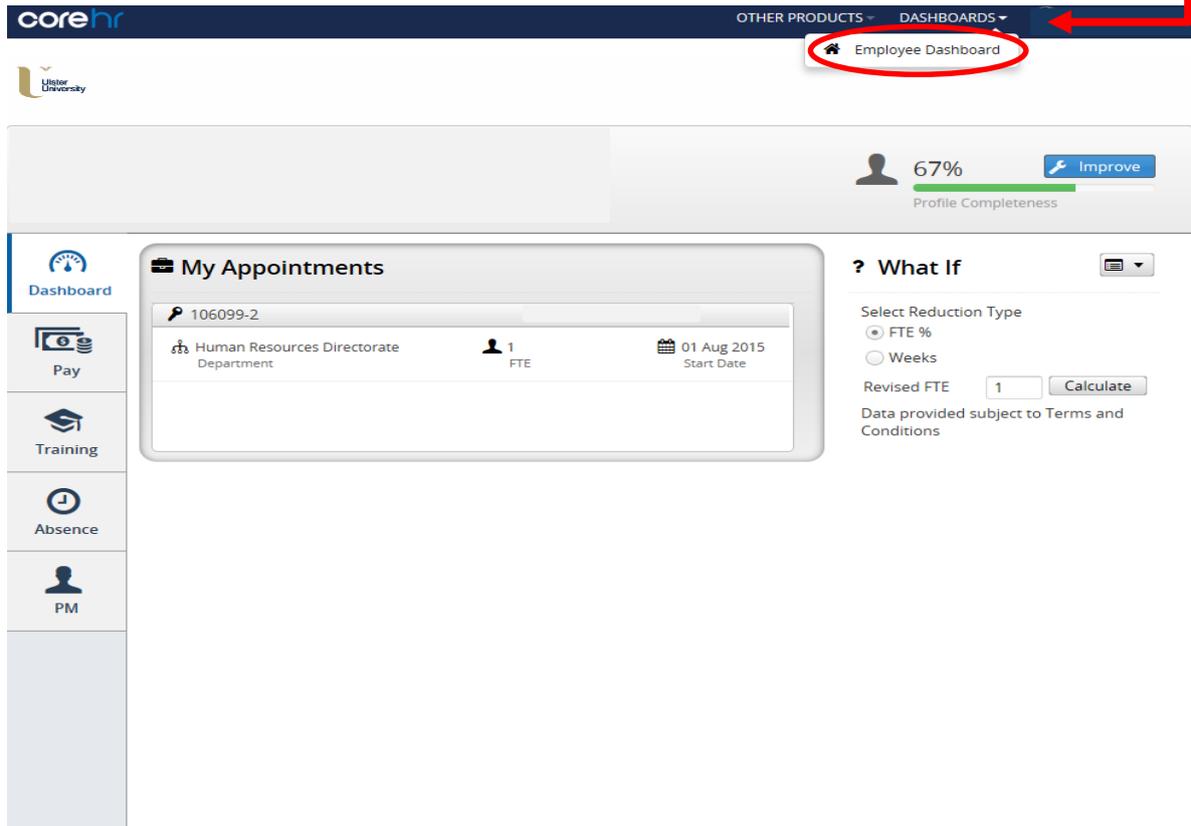
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## SECTION 1 – EMPLOYEES

### 1. Employees requesting Annual Leave on Core Portal

Click on the 'Dashboards' drop down arrow at the top of the screen and select 'Employee Dashboard'.





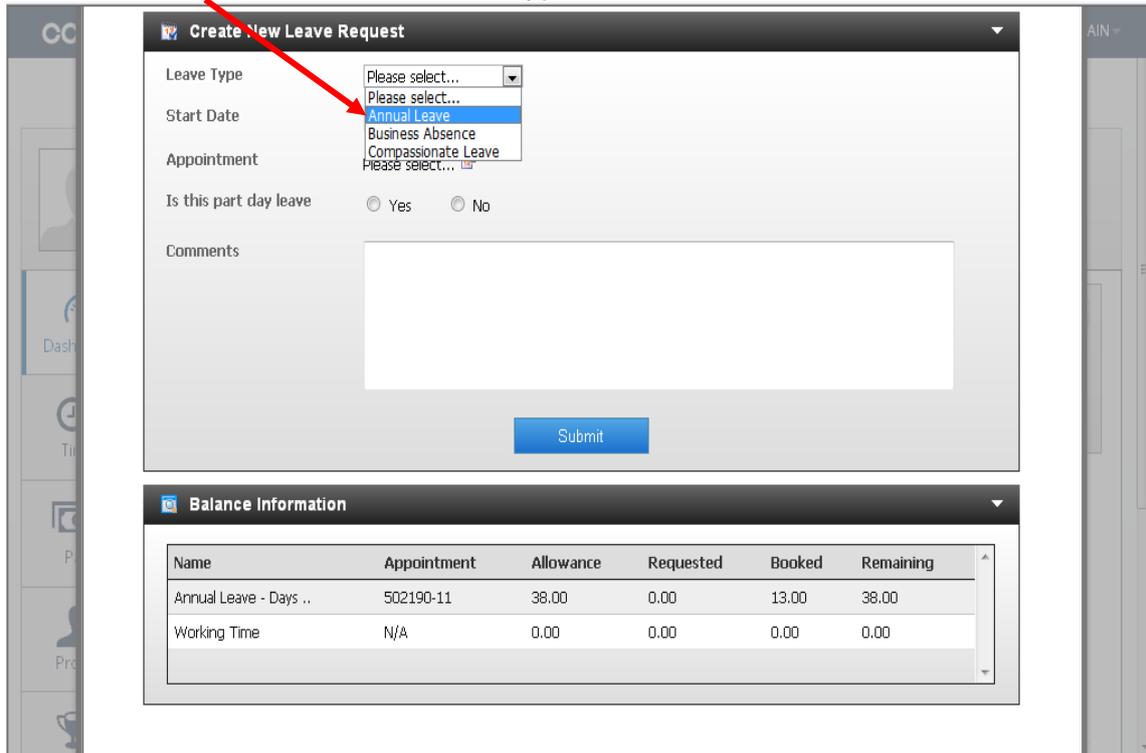
Click on 'Absence'

The screenshot shows the Core Portal dashboard for Ulster University. At the top, there is a navigation bar with 'OTHER PRODUCTS' and 'DASHBOARDS'. Below this, the user's profile is shown with a '67%' profile completeness and an 'Improve' button. The main content area is divided into three sections: 'My Appointments' (showing an appointment for 106099-2 on 01 Aug 2015), 'What If' (with a 'Calculate' button), and a sidebar menu. The sidebar menu includes 'Dashboard', 'Pay', 'Training', 'Absence' (circled in red), and 'PM'. A red arrow points from the text 'Click on 'Absence'' to the 'Absence' menu item.

Click on 'Book Time Off'.

The screenshot shows the 'My Requests' page in the Core Portal. The top navigation bar includes 'OTHER PRODUCTS', 'DASHBOARDS', and 'ADMIN MENU'. The user's profile shows '100%' profile completeness and a 'My Profile' button. The main content area is divided into three sections: 'My Requests' (showing an 'Annual Leave' request for 10 days, approved on 19th Jun 2015), 'Work Week 07 Mar 2016 - 13 Mar 2016' (showing a calendar with 'Resting' days on Sat 12 and Sun 13), and 'My Balances' (showing 'Annual Leave - D...' with a balance of 20.00 days). The 'Book Time Off' button in the 'My Requests' section is highlighted with a red arrow. The sidebar menu includes 'Dashboard', 'Pay', 'Training', 'Absence', and 'PM'.

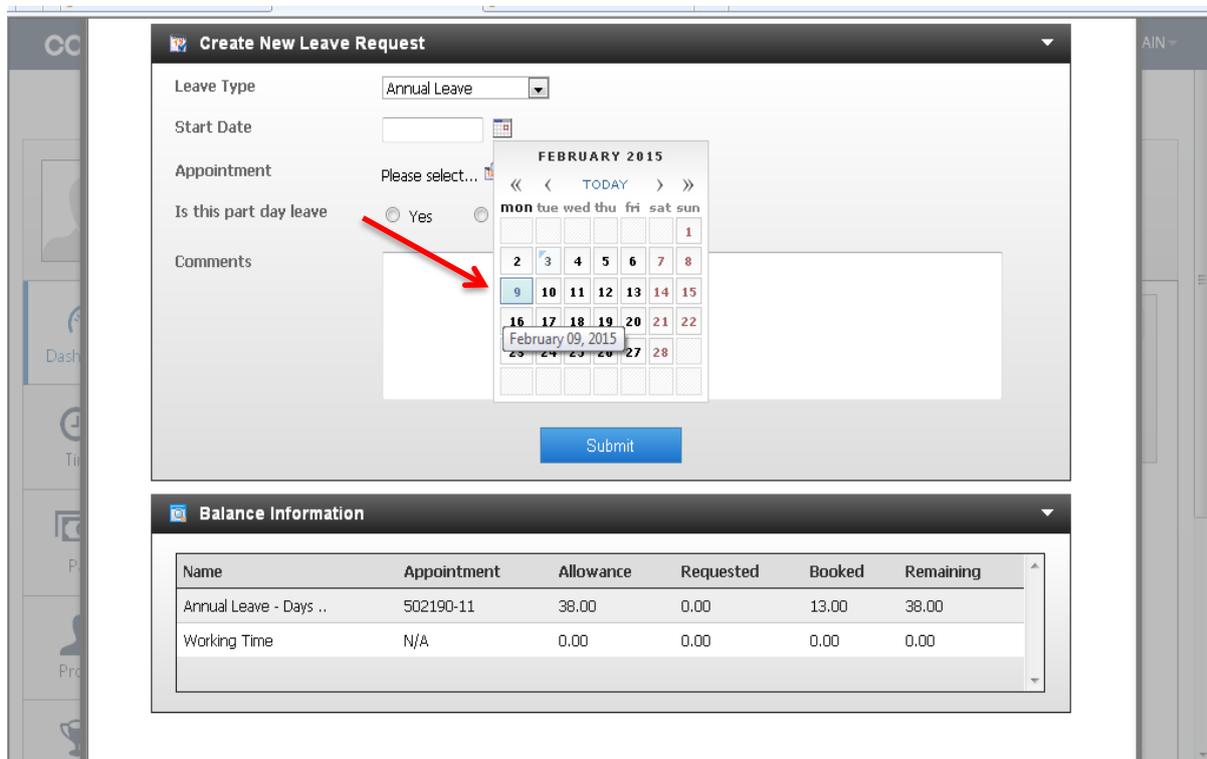
Select 'Annual Leave' as the Leave Type.



The screenshot shows the 'Create New Leave Request' form. The 'Leave Type' dropdown menu is open, and 'Annual Leave' is selected. Below the form is a 'Balance Information' table.

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00

Select the date you would like to start your Annual Leave. You can also enter the date in the format – **dd/mm/yy** or you can select from the calendar as below.



The screenshot shows the 'Create New Leave Request' form with a calendar pop-up. The 'Leave Type' is set to 'Annual Leave'. The calendar is for February 2015, and the date 'February 09, 2015' is selected. Below the form is a 'Balance Information' table.

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00



Select if it is part day Annual Leave or full day Annual Leave.

The screenshot shows the 'Create New Leave Request' form. The 'Leave Type' is set to 'Annual Leave' and the 'Start Date' is '09/02/15'. Under the 'Appointment' section, there are two radio buttons: 'Yes' and 'No'. A red arrow points to the 'Yes' radio button. Below this is a 'Comments' text area and a 'Submit' button. Below the form is a 'Balance Information' table.

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00

If it is part day Annual Leave, select if it is in the morning or the evening time.

This screenshot shows the 'Create New Leave Request' form with 'Is this part day leave' set to 'Yes'. The 'Part Day Segments' section has '1/2 of a day' selected, with an 'Enter Hours &...' button. To the right, there is a dropdown menu for 'Morning/Afternoon' with 'Morning' selected. A red arrow points to this dropdown. The 'Balance Information' table is also visible at the bottom.

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00



If it is a full day's Annual Leave, (or more than one days Annual Leave) select the end date of your Annual Leave request.

**Create New Leave Request**

Leave Type: Annual Leave

Start Date: 09/02/15

Appointment: [Empty]

Is this part day leave:  Yes  No

End Date: 09/02/15

Comments: [Empty]

**Balance Information**

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00



Click **Submit** to request your Annual Leave.

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ...	502190-11	38.00	0.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00

If you had two or more appointments, you must select which appointment the Annual Leave request applies to.

As you may have a different Line Manager for each post held it is important to select the correct appointment. To do this click 'OK' and then click on 'Appointment' and select your desired appointment.



The screenshot shows the 'Book Time Off' interface. The main window is titled 'Create New Leave Request'. It contains the following fields:

- Leave Type: Annual Leave (dropdown)
- Start Date: 22/02/16 (calendar icon, circled in red)
- Appointment: Please select... (dropdown)
- Is this part day leave: Yes (radio), No (radio, selected)
- End Date: 22/02/16 (calendar icon)
- Comments: (text area)

An error message dialog box is displayed over the form:

Message from webpage

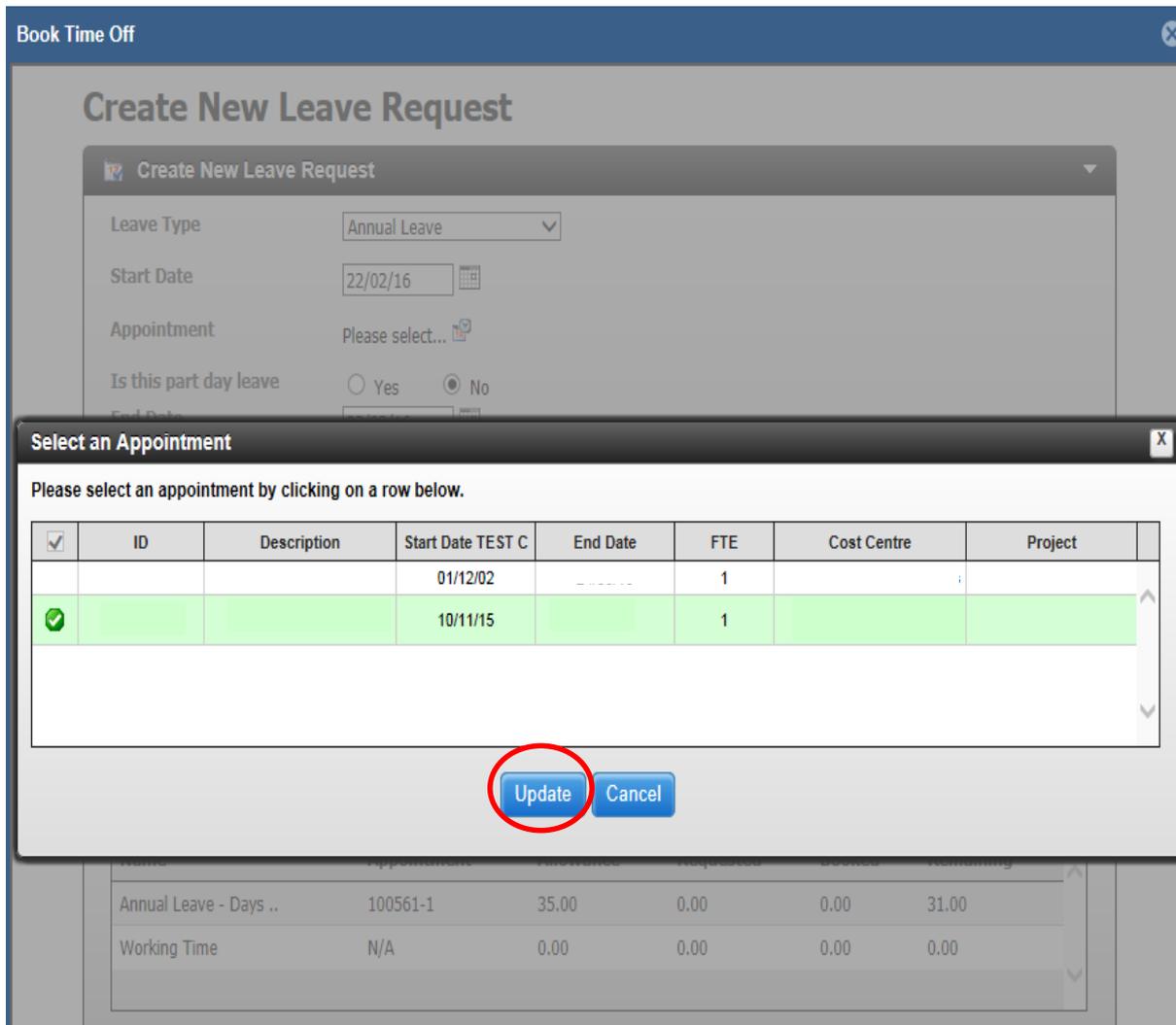
You must select an appointment to submit a leave request. Please select an appointment and try again.

The 'OK' button in the dialog box is circled in red.

Below the form is a 'Balance Information' table:

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	100561-1	35.00	0.00	0.00	31.00
Working Time	N/A	0.00	0.00	0.00	0.00

Select the appointment and click 'Update'.

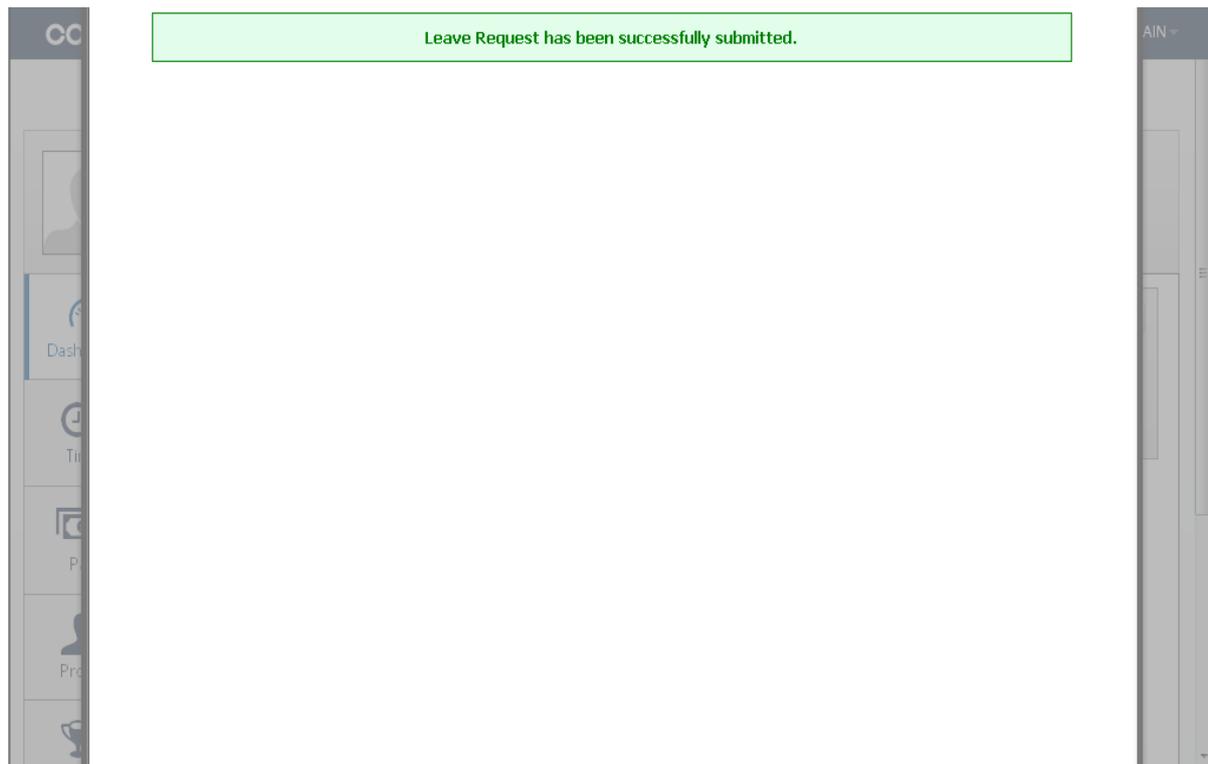


The screenshot shows the 'Book Time Off' interface. A 'Create New Leave Request' dialog box is open, displaying fields for 'Leave Type' (Annual Leave), 'Start Date' (22/02/16), 'Appointment' (Please select...), and 'Is this part day leave' (No). Below this, a 'Select an Appointment' modal window is displayed, containing a table with columns: ID, Description, Start Date TEST C, End Date, FTE, Cost Centre, and Project. The second row of the table is highlighted in green and has a green checkmark in the first column. A red arrow points to this row. Below the table, the 'Update' button is circled in red, and the 'Cancel' button is also visible.

<input type="checkbox"/>	ID	Description	Start Date TEST C	End Date	FTE	Cost Centre	Project
<input type="checkbox"/>			01/12/02	-----	1		
<input checked="" type="checkbox"/>			10/11/15		1		



The following message will then be displayed



The employee will now receive an automated email confirming the Annual Leave request has been submitted, as shown below.

-----Original Message-----

From: [corehr@ulster.ac.uk](mailto:corehr@ulster.ac.uk) [<mailto:corehr@ulster.ac.uk>]

Sent: 10 March 2016 15:31

To: -----

Subject: ANNUAL LEAVE request confirmation

The following leave request has been submitted:

Employee: -----

Leave type: ANNUAL LEAVE

Start date: 21-MAR-16

End date: 25-MAR-16

For further information, please login to Employee Self Service (via UU Portal/Staff services Tab)

This is a system generated email. Please do not reply. CoreTime



Your Line Manager will receive an email as shown below.

-----Original Message-----

From: [corehr@ulster.ac.uk](mailto:corehr@ulster.ac.uk) [<mailto:corehr@ulster.ac.uk>]

Sent: 10 March 2016 15:31

To: -----

Subject: ANNUAL LEAVE request submitted. Action required.

----- has submitted the following leave request:

Leave type: ANNUAL LEAVE

Start date: 21-MAR-16

End date: 25-MAR-16

No. of Days: 5

Please login to Employee self Service (Via UU Portal/Staff Services tab), navigate to the Approve Leave Request screen and Authorise or Reject this request as appropriate.

This is a system generated email. Please do not reply.

CoreTime

The **Employee** will then receive an email confirming that the requested Annual Leave has been processed as below.

*The leave request that you recently submitted has been processed. To view full details of this leave request please log in to your Core Portal Employee Self Service account. You can log in to your account by clicking into Employee Self Service:  
Regards, Core Time Administrator*



The employee will receive a further automated email confirming if the Annual Leave requested has been either '**Accepted**' or '**Rejected**'.

The following leave request has been Approved by.

Employee: -----  
Leave type: ANNUAL LEAVE  
Start date: 27-JAN-16  
End date: 27-JAN-16  
No of Days: 1

For further information, please login to Employee Self Service and select the 'View My Leave Request Enquiry' option.

This is a system generated email. Please do not reply.

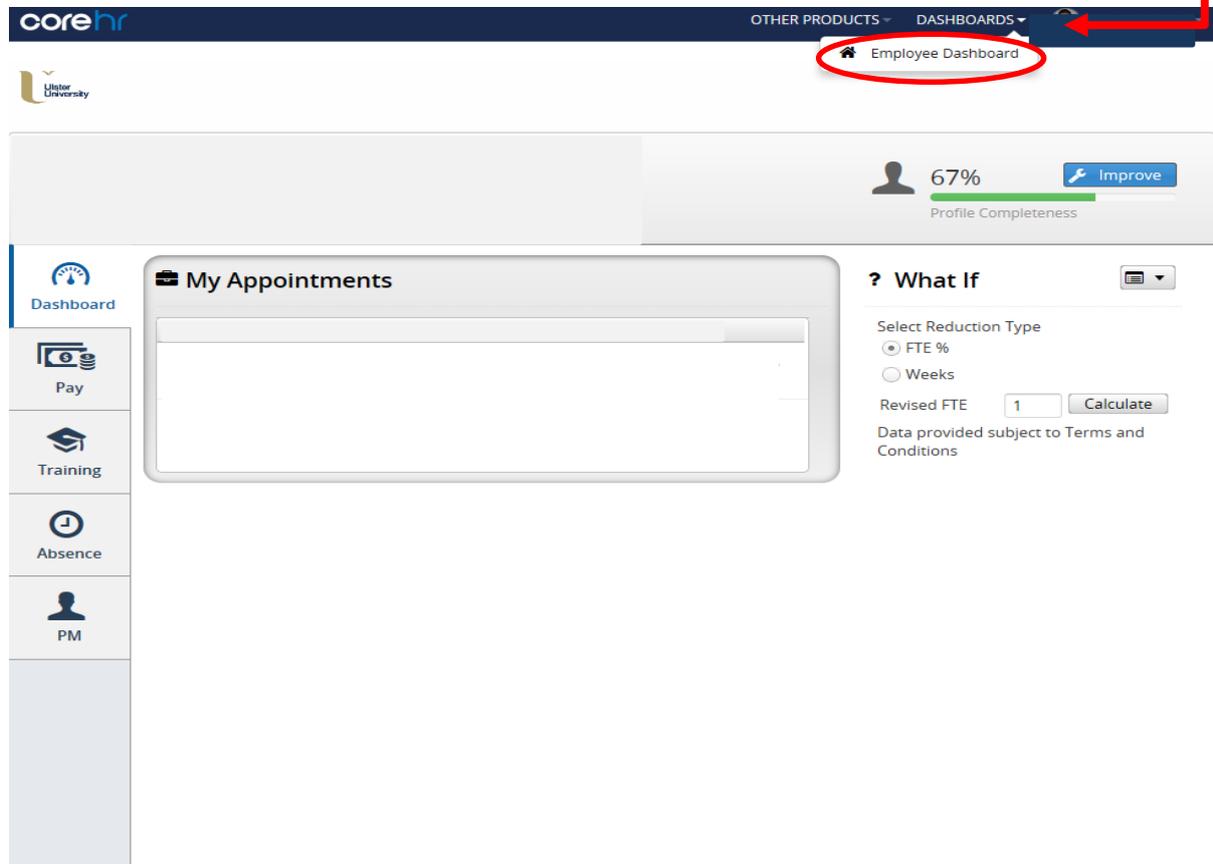
Core Time

When Annual leave has been approved the total number of days will be deducted from your Annual Leave Balance.

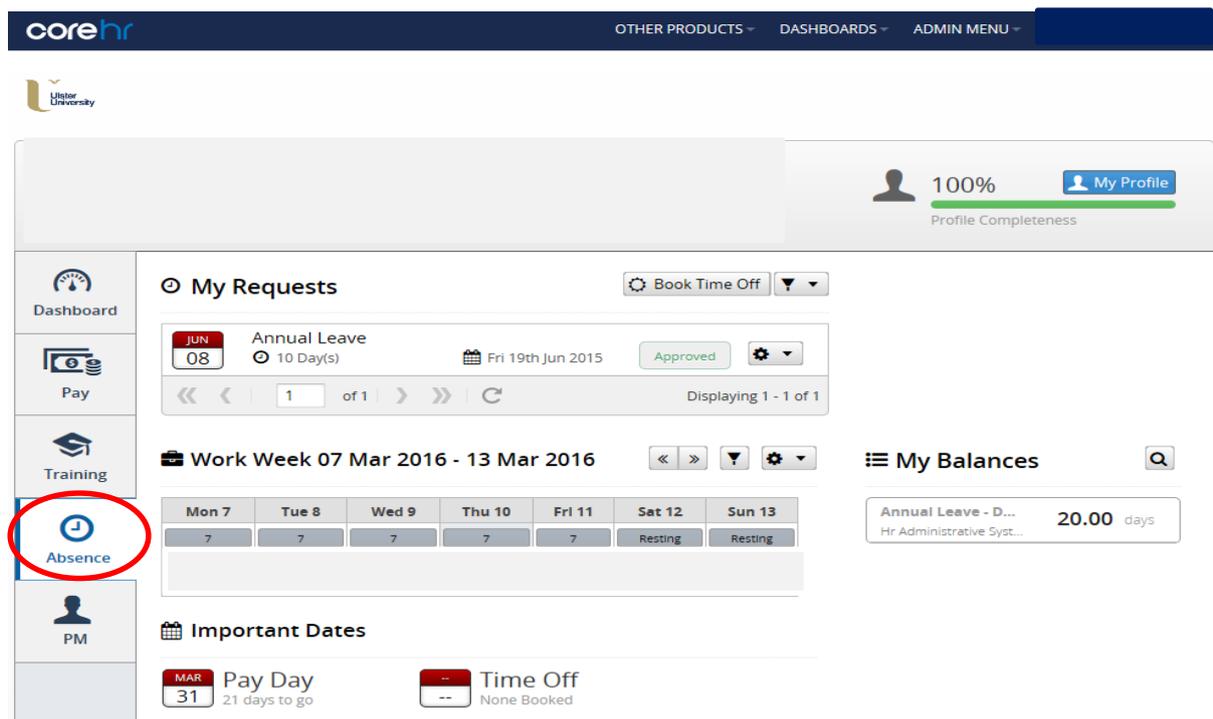


## 2. Amending Annual Leave already approved in Core Portal

Click on the 'Dashboards' drop down arrow at the top of the screen and select 'Employee Dashboard'.



Click on the 'Absence' tab.





Your approved Annual Leave be displayed as shown below.

**Dashboard**

**Pay**

**Training**

**Absence**

**PM**

### My Requests Book Time Off

FEB 24	Annual Leave 1 Day	Wed 24th Feb 2016	Submitted	⚙️
JAN 27	Annual Leave 1 Day	Wed 27th Jan 2016	Submitted	⚙️
OCT 26	Annual Leave 5 Day(s)	Fri 30th Oct 2015	Rejected	⚙️

1 of 1 | Displaying 1 - 3 of 3

### Work Week 15 Feb 2016 - 21 Feb 2016

Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13
7	7	7	7	7	Resting	Resting

### My Balances

Annual Leave - D... 19.50 days

Placement Student

### Important Dates

FEB  
25

Pay Day  
6 days to go

--  
--

Time Off  
None Booked

Click on the drop down arrow beside the requested day(s) you would like to amend and select **'Edit Request'**.

**My Requests** [Book Time Off] [Filter]

Month	Day	Request Type	Duration	Date	Status	Action
FEB	24	Annual Leave	1 Day	Wed 24th Feb 2016	Submitted	[Settings]
JAN	27	Annual Leave	1 Day	Wed 27th Jan 2016	Submitted	[Settings]
OCT	26	Annual Leave	5 Day(s)	Fri 30th Oct 2015	Rejected	[View Details] [View Team Absence] <b>[Edit Request]</b> [Cancel Request]

Work Week 15 Feb 2016 - 21 Feb 2016 [Filter] [Settings]

Mon 7	Tue 8	Wed 9	Thu 10	Fri 11	Sat 12	Sun 13
7	7	7	7	7	Resting	Resting

**My Balances** [Filter]

Annual Leave - D...	19.50 days
Placement Student	

**Important Dates**

FEB 25	Pay Day 6 days to go	--	Time Off None Booked
--------	-------------------------	----	-------------------------

Make the appropriate amendment(s) and click on **'Submit'**

**Update Leave Request**

Request ID: 0000000183      Date Requested: 04/02/15

Status: Unprocessed

Leave Type: Annual Leave

Start Date: 23/02/15

Appointment

Is this part day leave:  Yes  No

End Date: 23/02/15

Comments: [Text Area]

[Submit] [Delete]

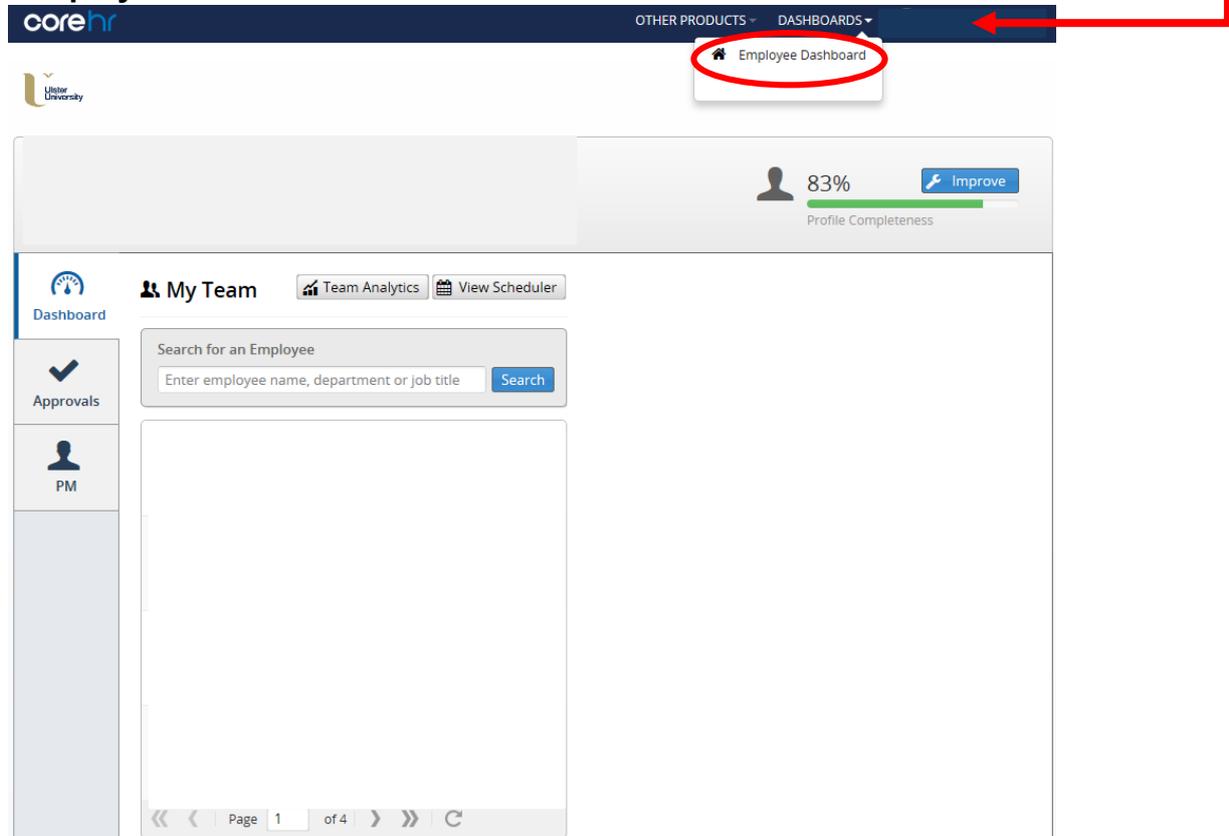
**Balance Information**

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave - Days ..	502190-11	38.00	4.00	13.00	38.00
Working Time	N/A	0.00	0.00	0.00	0.00

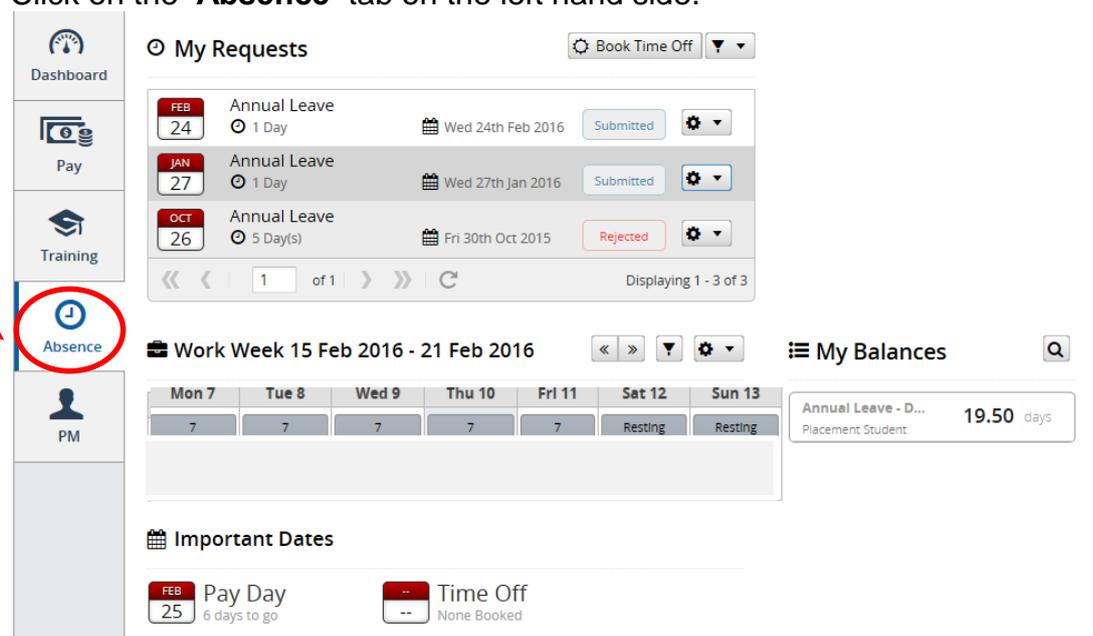


### 3. Cancelling leave in Core Portal

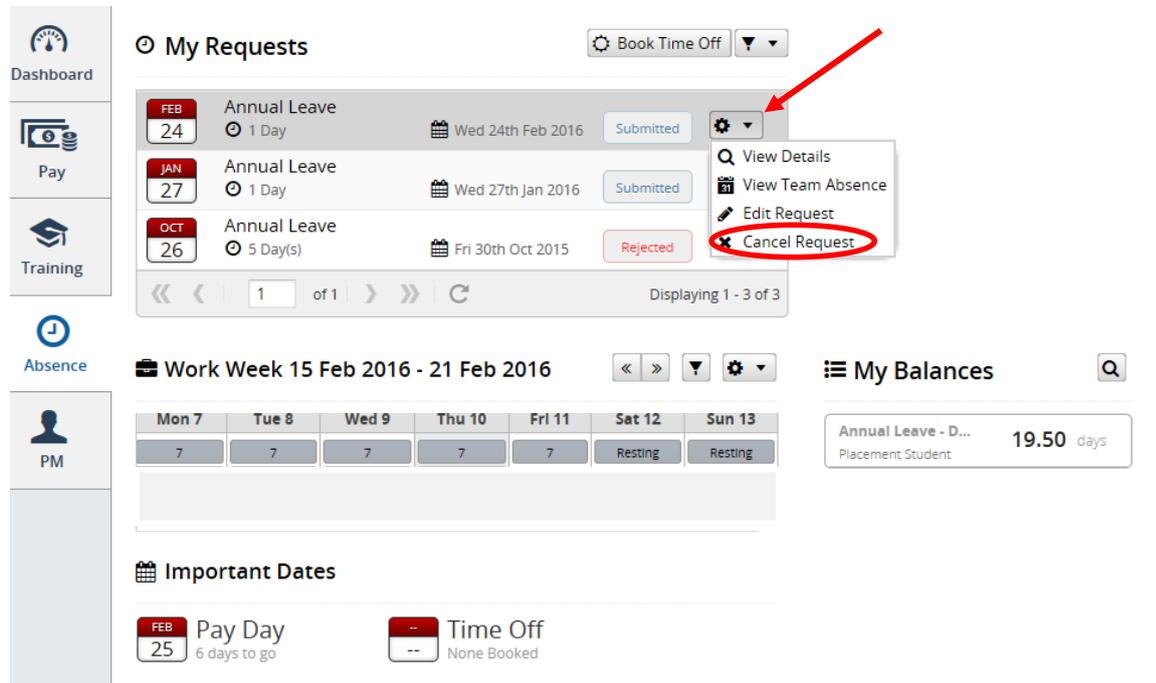
Click on the 'Dashboards' drop down arrow at the top of the screen and select 'Employee Dashboard'.



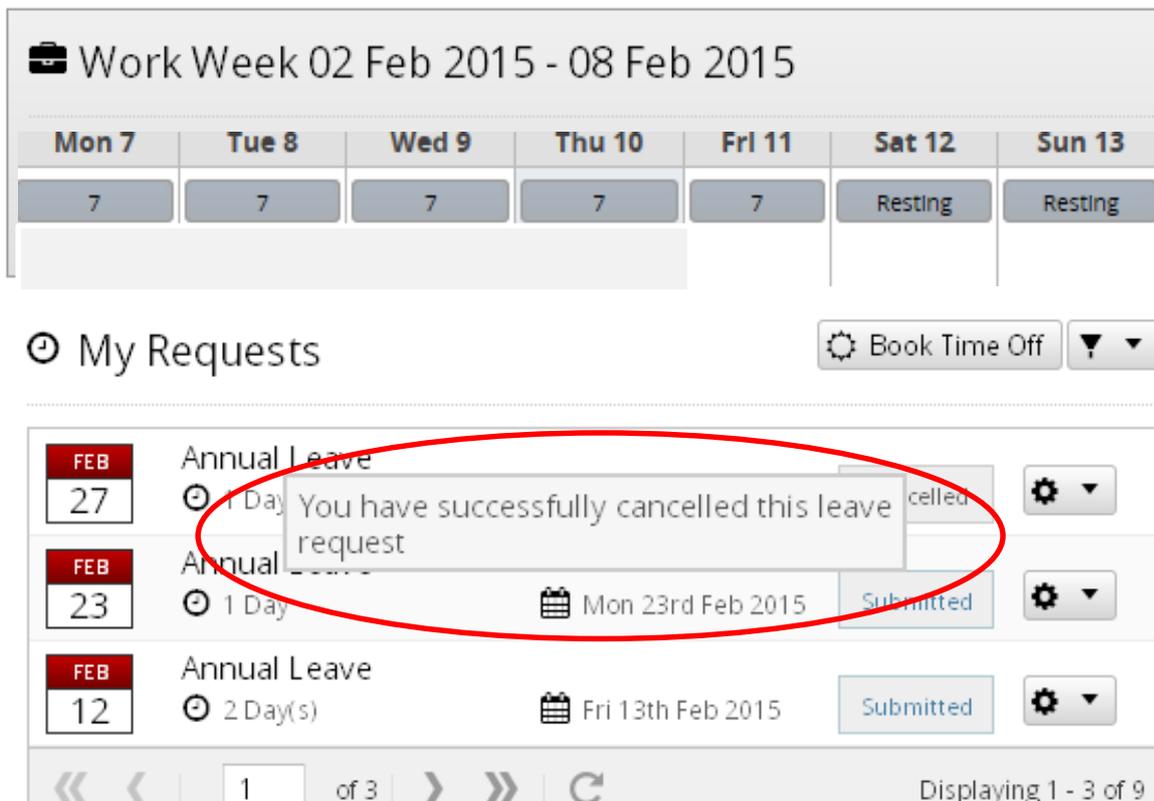
Click on the 'Absence' tab on the left hand side.



Click on the drop down arrow beside the requested day(s) you would like to cancel and select 'Cancel Request'.



This message below should then appear.





**Line Managers** will also receive an automated email to confirm that an employee has withdrawn their Annual Leave Request, as shown below.

-----Original Message-----

From: [corehr@ulster.ac.uk](mailto:corehr@ulster.ac.uk) [<mailto:corehr@ulster.ac.uk>]

Sent: 01 March 2016 11:13

To: -----

Subject: ANNUAL LEAVE request cancelled by -----

*The following leave request has been cancelled:*

Employee: -----

Leave type: ANNUAL LEAVE

Start date: 02-MAR-16

End date: 02-MAR-16

*This is a system generated email. Please do not reply.*

Core Time

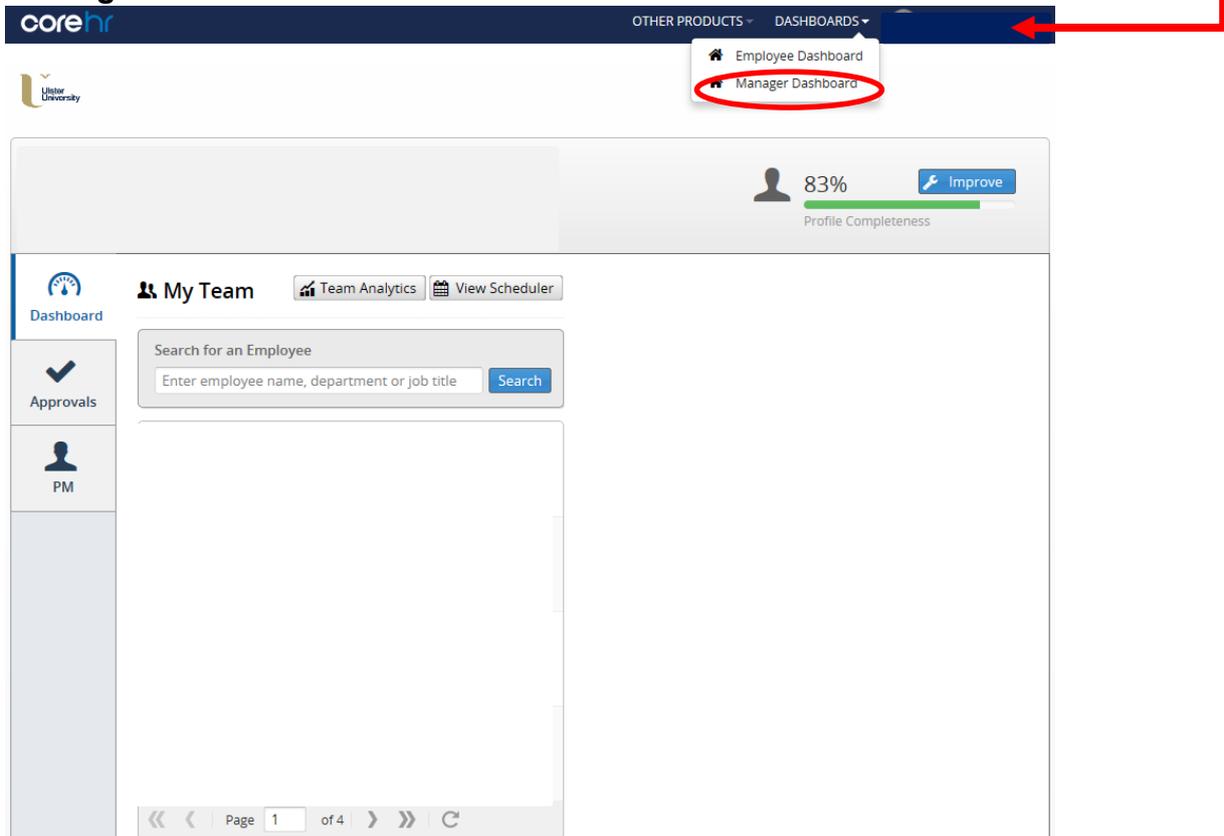
When Annual Leave request has been cancelled the total number of days will be added to your Annual Leave Balance.



## SECTION 2 – LINE MANAGERS

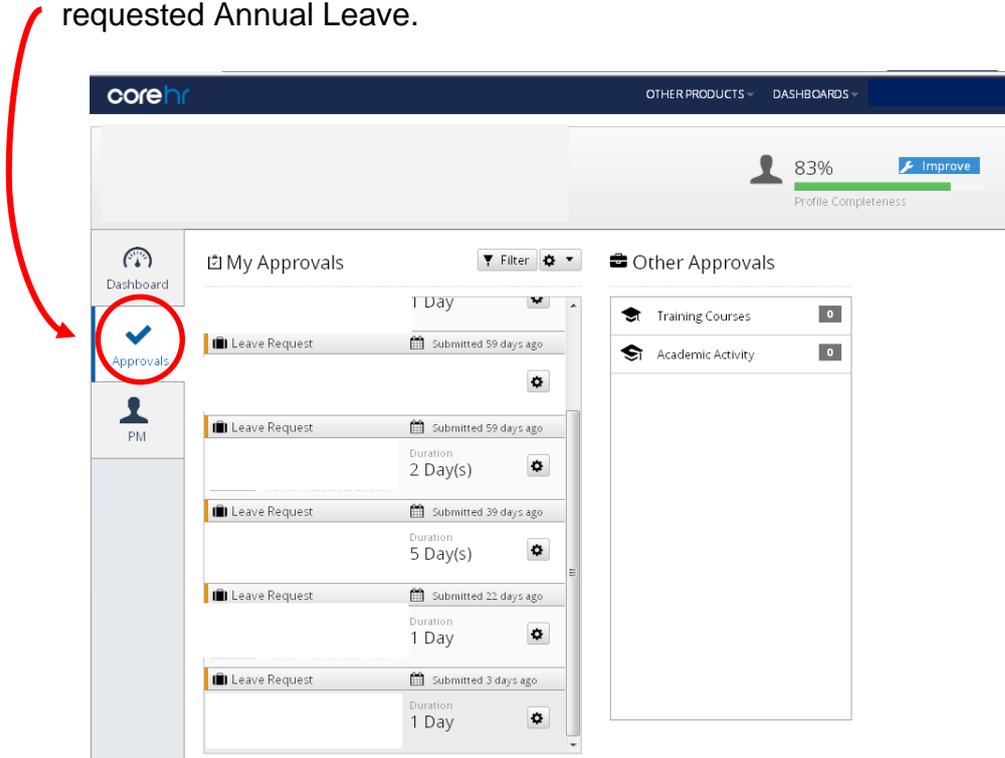
### 1. Authorising Annual Leave on Core Portal as a Line Manager

Click on the ‘Dashboards’ drop down arrow at the top of the screen and select ‘Manager Dashboard’.

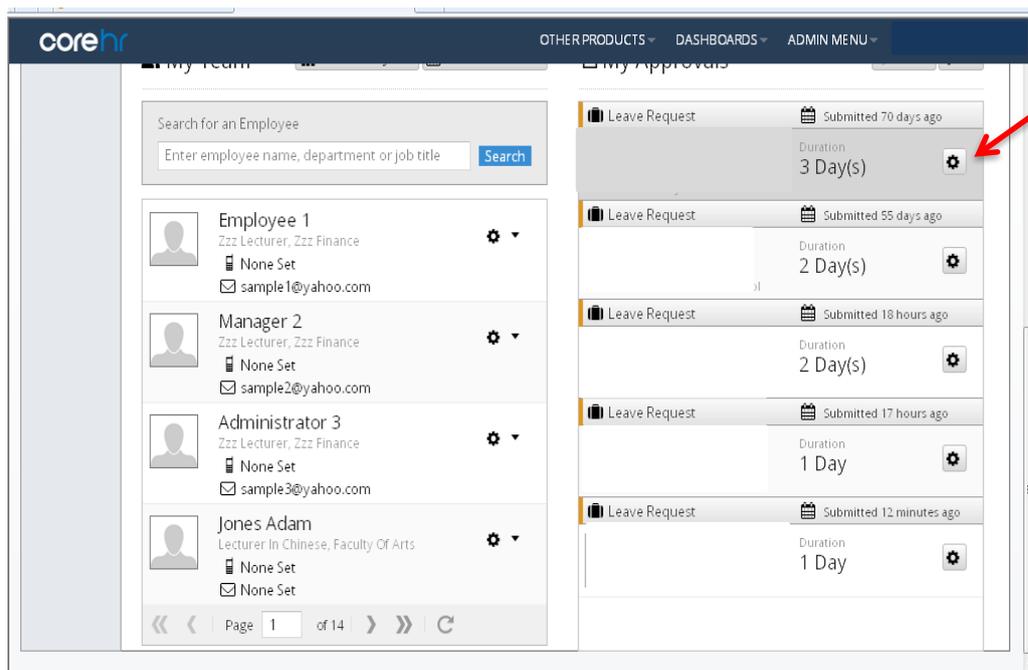




Select **'Approvals'** to view a list of all employees within your Team who have requested Annual Leave.



To **approve** Annual Leave, click on the settings symbol beside the relevant employee's name.





Line Managers should review Annual Leave requests submitted, and indicate by checking the tick box.

**Approve / Reject Leave Request**

25 Nov 2014  
12:02 PM

Duration	3 Day(s)	Part Day	No
Leave Type	Annual Leave	Status	Unprocessed
Date From	22 Dec 2014	Date To	24 Dec 2014

Click [here](#) to read and review the terms and conditions for approval.

I confirm that I have checked the submitted leave request

Set status to

To **'Approve'** or **'Reject'** the Annual Leave request, click on the drop down arrow and select either **'Rejected'** or **'Approved'**.

**Approve / Reject Leave Request**

25 Nov 2014  
12:02 PM

Duration	3 Day(s)	Part Day	No
Leave Type	Annual Leave	Status	Unprocessed
Date From	22 Dec 2014	Date To	24 Dec 2014

Click [here](#) to read and review the terms and conditions for approval.

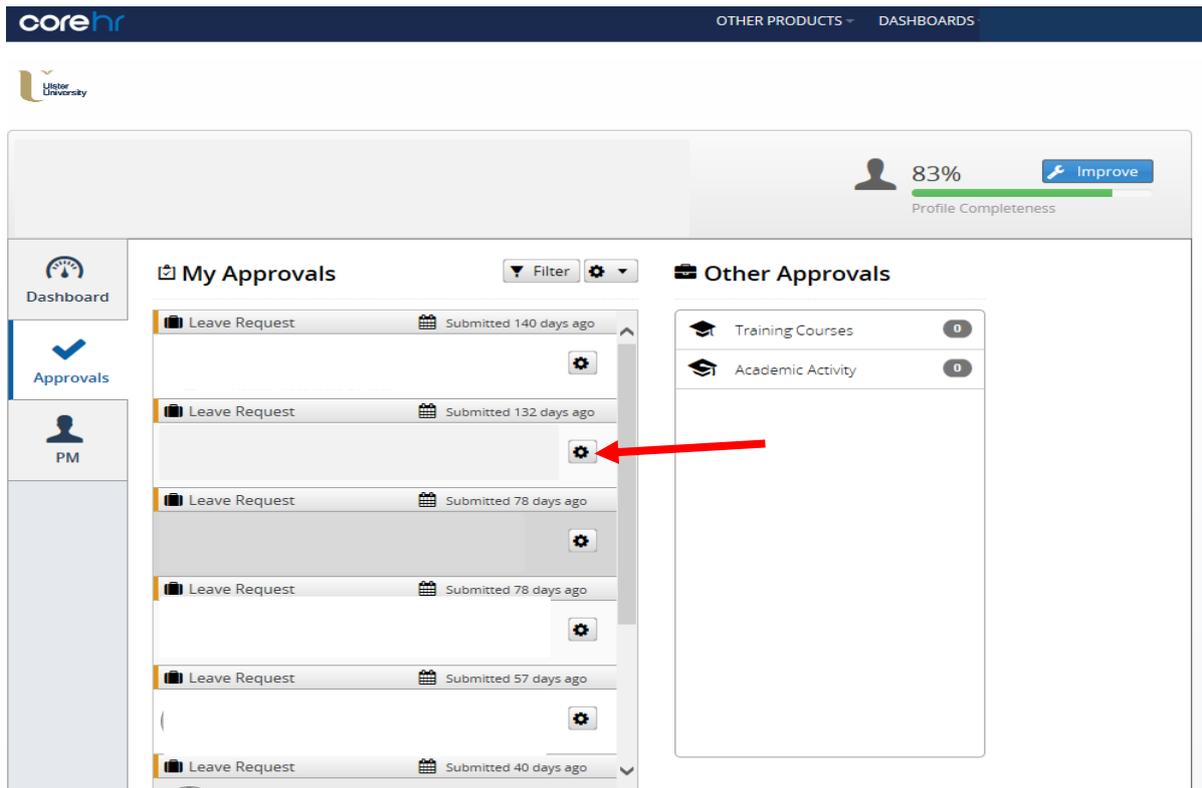
I confirm that I have checked the submitted leave request

Set status to

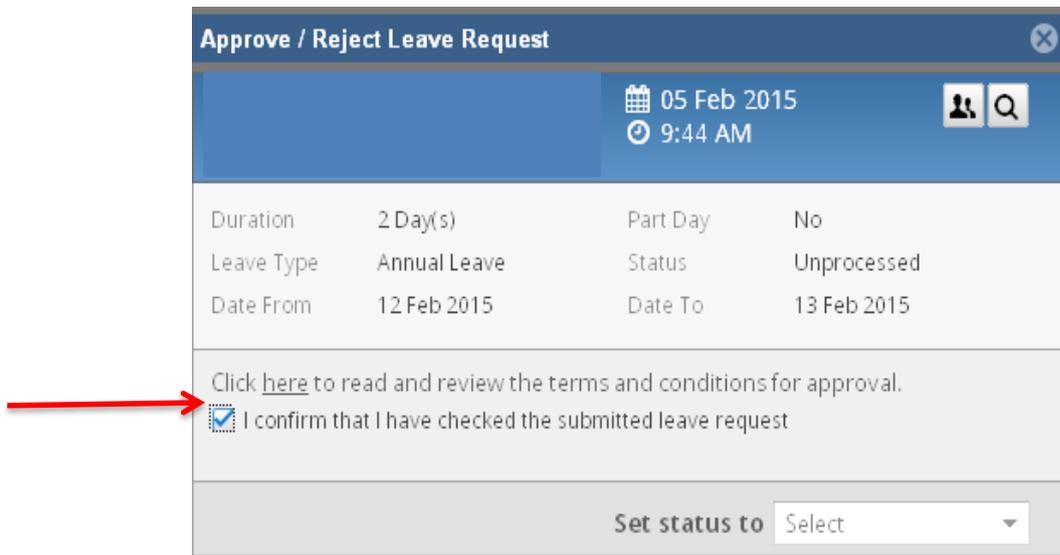
- Rejected
- Approved

Adam  
In Chinese, Faculty Of Arts

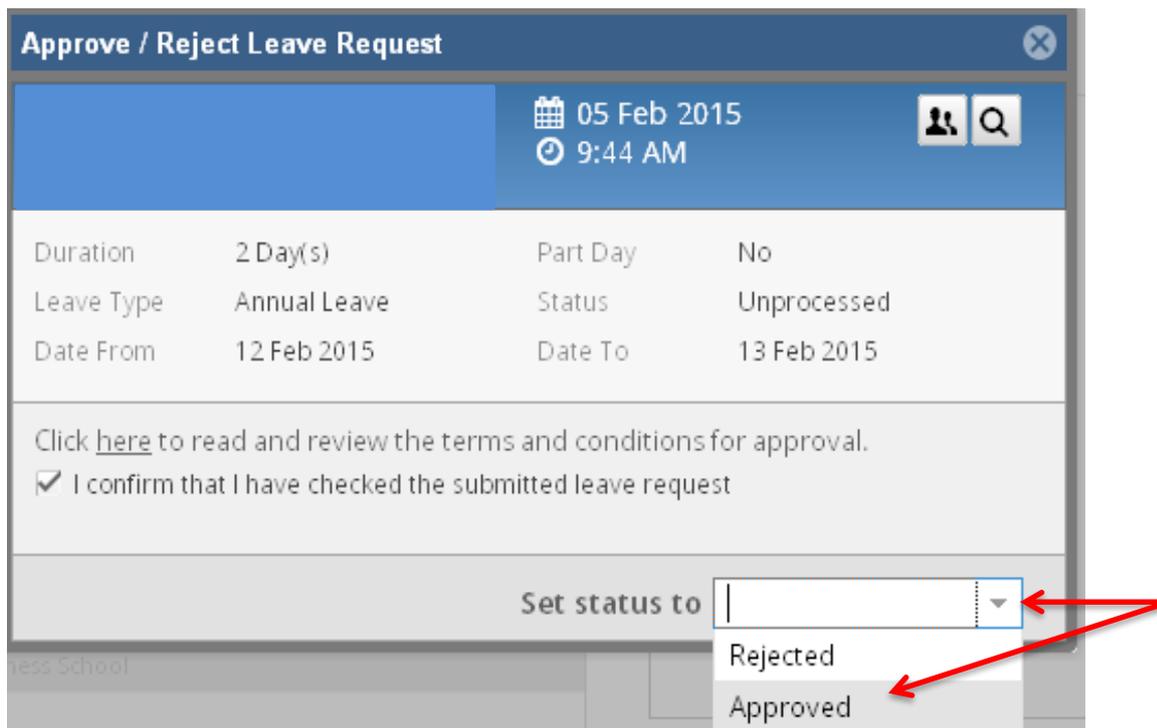
To approve Annual Leave, click on the settings symbol beside the employee's name.



Click on the box to confirm that you have checked the amended re-submitted Annual Leave request.



Click on the drop down arrow and select '**Rejected**' or '**Approved**'.



**Approve / Reject Leave Request**

05 Feb 2015  
9:44 AM

Duration	2 Day(s)	Part Day	No
Leave Type	Annual Leave	Status	Unprocessed
Date From	12 Feb 2015	Date To	13 Feb 2015

Click [here](#) to read and review the terms and conditions for approval.  
 I confirm that I have checked the submitted leave request

Set status to

- Rejected
- Approved

The **Employee** will then receive an email confirming that the requested Annual Leave has been processed as below.

*The leave request that you recently submitted has been processed. To view full details of this leave request please log in to your Core Portal Employee Self Service account. You can log in to your account by clicking into Employee Self Service: Regards, Core Time Administrator*