University College Cork

# UCC ESS Online Leave Requests Manager Dashboard

Version 2.2

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# How to Access UCC Employee Self Service (ESS)

Type the following URL into a web browser <u>http://www.ucc.ie/en/ess</u> This brings you to the main UCC Employee Self Service (ESS) webpage

			Home > Support > CORE Port	al	
In This Section		SAVE TO FAVOURITES	CORE Po	ortal	
Home	>	SHARE	Employee Self-Service	YESEY	Ser Ser
Support Details	>	<b>*</b>	ESS		No.
User Guides	>	f	ESS Login $\rightarrow$	User > Guides	FAQs >
FAQs	>				

Click on **ESS Login:** This will open the Core Portal ESS@UCC login page. Staff can securely access ESS using Single Sign On (SSO) meaning your @ucc.ie login credentials.

Sign in	Enter your ( login creder your email a select t	ntials, i.
john.doe@ucc.ie 🛛 🗲		
Can't access your account?	1	
Sign-in options	*	
	Back Ne	xt
Problems signing in? S	udants plassa oo to	
https://sit.ucc.ie for help. https://it.ucc.ie for help.		

-	Enter your UCC     network password
	Enter password
	Forgot my password Sign in
1	Problems signing in? Students, please go to https://sit.ucc.ie for help. Staff, please go to https://it.ucc.ie for help.

#### **Manager Dashboard**

When you log into ESS with **Manager** rights the default landing page brings you to the **Manager Dashboard**. The Manager Dashboard is only available to those who are setup as approvers for leave.

To book you own leave switch to the **Employee Dashboard** from the Dashboards menu as per the screenshot below. Please follow the instructions outlined on the Employee Dashboard documentation to book your own leave.

		Jorenne Sontware paten	no due to be applied in
≡	Manager Dash	board	
	у	Employee Dashboard	Manager Dashboard

#### **Manager Dashboard**

The following information is available to view

- My Team
- Approvals
- Delegate Access
- Interviews

# My Team

- 1. This lists all employees who are assigned to you for leave approval.
- 2. The View Scheduler option on this tab allows you to view the schedule of all employees on your team and input uncertified sick leave [up to 2 days]. You will find this option under Action

•	My Team		-	ACTIONS A
-	Name, Department, Job Title	Q. My Team		
Nanager Dashboard	Employee	Position	Contact Details	
My Team	JD John Doe 77777	Hr Business Manager	1017123480	:
Approvals	Contraction and	Hr Central Services Senior Executive Assistant	18771852545 111021000	:
Delegate Access	O	Hr Central Services Hr Co-Ordinator		:
Interviews				

💵 My Team

🛗 View Scheduler

3. The View Scheduler will show you any booked annual leave and sick leave input for your team.

The data can be viewed by days or months

	Scheduler r Dashboard > Team Scheduler								
Searc	h Employees	Q =					Date 18-Jan-2021	<b>⊟</b> < >	WEEK MONTH
							Period: 202104		
	Team Member	Mo	n 18th	Tue 19th	Wed 20th	Thu 21st	Fri 22nd	Sat 23rd	Sun 24th
	ream wember								
	John Doe	09:15 - 17:00	)	09:15 - 17:00	09:15 - 17:00	09:15 - 17:00	09:15 - 17:00	Resting	Resting
JD	Manager Hr Business	ANLE - 01:00	)						
	Th Dualiteaa								
-	1000	09:15 - 17:00	)	09:15 - 17:00	09:15 - 17:00	09:15 - 17:00	09:15 - 17:00	Resting	Resting
9	terne i sen el tradación i tradición de com								
	Abria Terrar	09:15 - 17:00	)	09:15 - 17:00	09:15 - 17:00	09:15 - 17:00	09:15-17:00	Resting	Resting
0	to service and	ANLE - 01:00	)						
	D. Study Briddle								

4. To get a detailed breakdown of a team member annual leave balance click on the Ellipsis icon to the right of the employee name under My Team highlighted below

	Employee	Position	Contact Details	
	John Doe	Hr Business	087123456	
JD	77777	Manager	hrissupport@ucc.ie	
0	100000.000000 10000	in contraction contractions. Service Contraction Contractions	10.00 mm (0.000 mm)	View Team
0	Marin (Fferenze)	in Salis Sector	071607711	Delegate Access

# **My Approvals**

1. The Approvals tab lists all the annual leave requests that have been submitted to you for approval

# Please note that any leave booked or changes made to leave on ESS may take 10 minutes to update on screen

$\equiv$ Manager Dashboard -	٩	Search Dashboa	rds or Widgets	
	My Approvals Notifications	APPROVALS		
-	Annual Leave	21 Jan	VIEW	
Manager Dashboard	Annual Leave	21 Jan	VIEW	
🕰 My Team	Sick Leave (Casual Paid 100%)	27 Jan	VIEW	
Approvals     Delegate Access	Sick Leave (Casual Paid 100%)	29 Jan	VIEW	
Therviews				
				And - William

2. Click on the Leave Approval History for a list of all leaves submitted for your approval, you will find the Leave Approval History under the Actions button

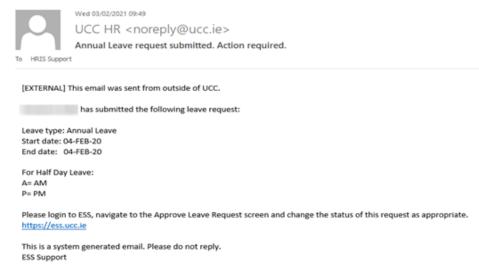
21 Jan     VIEW       21 Jan     VIEW       21 Jan     VIEW       27 Jan     VIEW       29 Jan     VIEW	21 Jan     VIEW       27 Jan     VIEW	· Annie Character	Leave Ap	proval History
27 Jan VIEW	27 Jan VIEW	C recuti sece	21 Jan	VIEW
		O Hariso Officerease	21 Jan	VIEW
29 Jan VIEW	29 Jan VIEW	O Harris (Thereas)	27 Jan	VIEW
Contraction Contraction Contraction		O Harriso (Theorem )	29 Jan	VIEW

← Manager [	Dashboard						()
Leave Approval Manager Dashboard >	History Leave Approval History						
Historic Leave	e Approvals						
Employee	Date Approved	Start Date	End Date	Leave Type	Duration	Status	
	N/A	11-Aug-2020	11-Aug-2020	Annual Leave	1	Unprocessed	:
	23-Jul-2020	11-Aug-2020	11-Aug-2020	Annual Leave	1	Approved	:

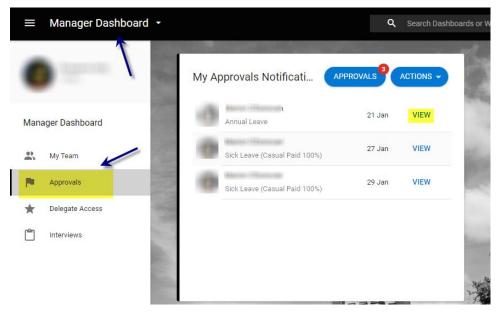
3. Use the arrow keys at the bottom right hand of the screen to navigate through the leave requests.

4. When a team member submits a leave request for approval you, as the assigned approver, will receive an email informing you of same to your **@ucc.ie email address.** This email will appear in your mailbox as per screen shots below

Annual	Leave	Request
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5. Log into ESS and on the Manager Dashboard choose the My Approvals tab



- 6. To approve or reject leave click on View next to the particular employee request
- 7. The following screen appears. You will see the employee name & the date the request was submitted on the left and the details of the request on the right.

My Approvals Manager Dashboard > My Approvals						VIEW DETAILS -
Actions Updates	<b>O</b>					
Search Q, =	Annual Leave					
Annual Leave 21 Jan	Date Submitted 21 Jan 2021 14:36					
Sick Leave (Casual Par., 27 Jan	Comments test block booking					
Sick Large (Canual Pat., 29 Jan	Leave Type Duration Annual Leave 11 Day(s)	Date From Wednesday, 24 Feb 2021	Date To Wednesday, 10 Mar 2021			
	To read and noises the items and conditions for approxil, J	Jease clok here				
					R	EJECT APPROVE

- 8. You can click on the link [Click <u>here</u> to read and review the terms and conditions for approval] in order to view a PDF of the leave terms policy at any stage
- 9. You <u>must</u> click on 'I confirm that I have checked the submitted leave request' to proceed

#### 10. Select Approved or Rejected

11. If you choose to approve the leave request, then the team member will receive an email to their @ucc.ie email address confirming same and their annual leave balance will be adjusted accordingly

	Wed 03/02/2021 10:42
	UCC HR <noreply@ucc.ie></noreply@ucc.ie>
	Your Annual Leave request has been Approved
To HRIS Suppo	rt
[EXTERNAL]	This email was sent from outside of UCC.
The followin	g leave request has been Approved by
Employee:	Restaura
	Annual Leave
Start date: 1 End date: 1	
For Half Day	Leave:
A= AM P= PM	
	nformation, please login to ESS and select the 'View My Leave Request Enquiry' option.
https://ess.u	
	em generated email. Please do not reply.
ESS Support	

Please note: If uncertified sick leave exceeds two days, it will not be possible for a manager/nominee to approve/enter it on ESS. You can reject the leave and advise the employee to follow the sick leave policy. A warning appears onscreen when you try to approve a sick leave request longer than the permitted 2 consecutive working days

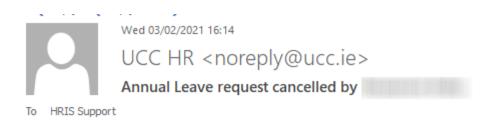
ок

This record has more than the 2 consecutive days allowed for this (704) for 02-Feb-2021. ...

12. If you choose to reject the leave request, you will be asked to enter a **Reject Reason** when you are submitting the response as per screen shot below.

	Enter Details	
Fr ne		
l	Comments	
h		
	CANCEL OK	

- 13. Enter the reason and then choose **Reject** e.g. in the instance where an employee submits more than 2 days uncertified sick leave
- 14. The team member will receive a system generated email to confirm same to their @ucc.ie email address
- 15. If a team member chooses to cancel a leave request they have already booked you will receive an email to **your @ucc.ie email address** confirming this as below



[EXTERNAL] This email was sent from outside of UCC.

The following leave request has been cancelled:

Employee: Leave type: Annual Leave Start date: 06-MAY-21 End date: 06-MAY-21

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

ESS Support

## **Delegate Access**

The **Delegate Access** tab allows a manger to delegate access of their team to another manager already setup as an approver for a particular period of time.

$\equiv$ Manager Dashboard $\cdot$		Q Search Dashboards or	Widgets	
•	Delegation			ADD DELEGATION
Manager Dashboard	Approver	С. = Туре	Date	-
😩 My Team				
P Approvals				
* Delegate Access				
Interviews		NOTHING TO SEE EXCEPT THIS FL		

1. To delegate access to another manager, click on Add Delegation

← Manager Dashboard				<b>()</b>
Add Approver Delegation Manager Dashboard > Add Approver Delegation				
Type * 👻	From Date *			
Delegate To * 👻	To Date			
Reason				
I authorise this individual to approve of	on my behalf			
				SAVE

- 2. Select Delegate To
- 3. A list of staff set as current approvers will appear, You can use the arrow keyss to scroll through the list and choose the relevant name to delegate to or it is more efficient to start to type in the name of the individual you want to select to locate them on the list..

Note: If a staff member is not available on the list please email hrissupport@ucc.ie for assistance

- 4. Choose the Dates you wish to delegate for
- 5. When the **'To' Date** expires the delegation rights for the particular team will automatically be removed
- 6. Enter a Reason
- 7. Click on I authorize this individual to approve on my behalf

Turne *	From Date *	
Type* Org Role	• 04-Feb-2021	
Delegate To *	To Date	
	+ 12-Feb-2021	

#### **8.** Click on SAVE

9. The delegation name and dates now appear on the Delegation tab

0	Delegation		ADD DELET	GATION
Manager Dashboard	Search Approvers	Q =		
	Approver	Туре	Date	
My Team		Manager	17-Feb-2021 - 18-Feb-2021	:
Approvals				
★ Delegate Access				

10. You can also **edit** the delegation at any time by clicking on the Ellipsis icon highlighted and choose Edit, allowing you to amend dates

	ADD DELEGATION
Q =	
Туре	Date
Manager	17-Feb-2021 - 18-Feb-2021
	View
	Edit
	Delete

Please note only staff setup as current approvers or delegates already will appear on this list of Delegate To. If you need to delegate to a person that does not appear on listing already please contact hrissupport@ucc.ie

<u>Please note that once online leave has been Approved an employee cannot edit the leave however it can be cancelled by them prior to the actual leave date. You will receive a cancellation email when this is done.</u>

# My Team - Inputting Uncertified Sick leave

Please note that **Uncertified Sick Leave** [Casual Paid Sick Leave] refers to absence from work, due to illness or injury for a maximum of two days. Extended periods of sick leave should not be recorded on ESS as a medical certificate is required. If sick leave exceeds two days, it will not be possible for a manager/nominee to approve/enter it on ESS. Please see leave policy on HR website <a href="https://www.ucc.ie/en/hr/policies/leave/sick/">https://www.ucc.ie/en/hr/policies/leave/sick/</a>

Note: The process below is based upon standard HR practices regarding the administration of sick leave.

- If a staff member is ill, they will inform their direct manager or nominee by phone or email
- The manager or nominee will then complete an SL1 form [physical record of sick leave notification] i.e. <u>https://www.ucc.ie/en/media/support/hr/formbank/SL1-</u> <u>SickLeaveNotification.pdf</u>
- For uncertified sick leave (which is a max of 2 consecutive days, as per HR policy):
  - When staff member returns to work, s/he records the absence in Core ESS which is then approved by their manager.
  - Each staff member should also <u>email</u> their manager and copy their nominee [if required] on their return to work
- For certified sick leave there is no change to the current process (leave is managed/approved by the local manager and recorded by HR)

#### To input Uncertified sick leave [up to 2 days only]

Please note – this can be completed by a Manager/nominee where an employee has not submitted their uncertified sick leave details on ESS.

1. Select the **My Team** tab and click on **View Scheduler w**hich can be found under **Actions** 

$\equiv$ Manager Dashboard $\cdot$		Q Search D	ashboards or Widgets	
	My Team			ACTIONS A
Manager Dashboard	Name, Department, Job Title	Q My Team	*	New Employee
Manager Dashboard	Employee	Position	Contact Details	
😩 My Team	John Doe	0.00.00000	101100	:
Approvals	77777			
★ Delegate Access	•			:
Tinterviews				
			1-20	of2 < ⇒

2. The Team Scheduler will open, select the row under the date next to the specific employee for which you wish to add an absence. Left click on row, then select Person Absences

Manager Dashboard Team Scheduler Manager Dashboard > Team Schedul	Team Scheduler will calendar where you ca click on the row under the	l open with a list of your Team a In add an absence on their beha the date for which you wish to in leave	nd a If Left Jut the				
Search Employees	a =					Date 15-Feb-2021 Period: 202108	₩¥₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩₩
Team Member	Mon 15th	Tue 16th	Wed 17th	Thu 18th	Fri 19th	Sat 20th	Sun 21st
JD John Doe Manager	09:15 - 17:00	09:15 - 17:00	09:15-17:00	09:15 - 17:00 Left Click	09:15 - 17:00	Resting	Resting
		09.1	5-17:00	$\rightarrow$ $$			
				90			
	09:15 - 17:00	09:15 - 17:00	09.15-17.00	99:15-17:00	09:15 - 17:00	Resting	Resting
	18th			0915+1720	09.15-17.00	Resting	Resting
Thu :15 - 17:00		0915-1700		0915-1700	09.15-1700	Resting	Restring
:15 - 17:00				0915-1720	09.15-17:00	Resting	Resting

3. The Leave record will open for the particular employee, and you can add an absence, by clicking on the Add Absence button on upper right of record

#### Note: You can only enter 2 days or less for Sick Leave (Casual Paid 100%)

← Team Scheduler								
Person Absences Manager Dashboard & Team Schedule	r ) Person Absences							ADD ABSENCE
John Doe 77777								
Search	۹ =							
Absence Type	Start Date	End Date	Days	AM/PM	Hours	lleeks	Num Docs	
Annual Leave	18Jan-2021	18-Jan-2021	1.00		1.00	0.14	0	:
Training And Develop Leave	11-Jan-2021	11-Jan-2021	.50	Ρ	.51	0.07	0	:
Annual Leave	20-Nov-2020	20-Nov-2020	.50	Å	.50	014	0	:

4. Select the **Leave type** i.e. Sick Leave Casual Paid 100%)

- Select the Start Dates for the sick leave. You can also input the duration in days. Select Next which will bring you the 2<sup>nd</sup> 'More' area
- 6. Enter a **Reason** and **Narrative** and click the **Save** button.

← Person Absen	Ces
Absence Details: Manager Dashboard > Te	John Doe - 77777 am Scheduler > Person Absences > Absence Details: John Doe - 77777
Absence Details	Reason       v       Select a reason for absence
2 More	Narrative
3 Document Upload	is
4 Balances	Enter a narrative for absence Return to Work Interview
	Work Related Interview Completed
Absence Save	d Successfully

The leave is now saved on the employee record

Person Absences Manager Dashboard > Team Scheduler > Person Absences										
JD John Doe 77777 Search	Q =									
Absence Type	Start Date	End Date	Days	AM/PM						
Sick Leave (Casual Paid 100%)	18-Feb-2021	19-Feb-2021	2.00							

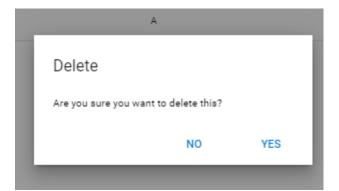
#### To edit/delete Employee leave

1. Return to the Person Absences record for the employee in question

Person Absences Manager Dashboard ) Team Scheduld	er ) Person Absences							ADD ABSENCE
John Doe 77777 Search	Q. <del></del>							
Absence Type	Start Date	End Date	Days	AMPM	Hours	Weeka	NumDoce	
Sick Leave (Casual Paid 100%)	18-Feb-2021	19-Feb-2021	2.00		2.00	0.29	0	E.
Annual Leave	18-Jan-2021	18-Jan-2021	1.00		1.00	0.14	0	-
Training And Develop Leave	11-Jan-2021	11-Jan-2021	.50	Ρ	.51	0.07	v .	Absence Details
Annual Leave	20-Noi+2020	20-Nor-2020	.50	Å	.50	0.14	0	sence

- 2. The leave record is open, select the Ellipsis next to the leave you wish to amend
- 3. You can select new dates for the leave and click **Save by** opting the View/Edit Absence Details

4. Or you can select the **Delete Absence** button



- 5. Then click Yes
- 6. The sick leave record will be deleted on the employee record

