OLLSCOIL TEICNEOLAÍOCHTA
BHAILE ÁTHA CLIATH
TECHNOLOGICAL
UNIVERSITY DUBLIN

# CoreHR User Guide

## FOR MANAGERS

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## 1. Responsibilities of a Line Manager

It is the responsibility of a line manager to ensure that the Core records of staff reporting to them are accurate and up to date. You should sign off hours and approve any missed clocking or leave requests on a weekly basis. In the event that you are unable to do this, it is your responsibility to manually update Core. Leave Requests and clocking adjustments can be signed off in Core Portal. Manual updates can be done in Core Back Office.

It is important that Core records are correct to ensure that HR are able to calculate entitlements, such as sick leave entitlements, quickly and accurately. The incorrect calculation of sick leave entitlements can result in staff unknowingly exhausting their paid sick leave entitlements which causes overpayments to occur.
Any queries regarding Core should be sent to leaveandbenefits@tudublin.ie.

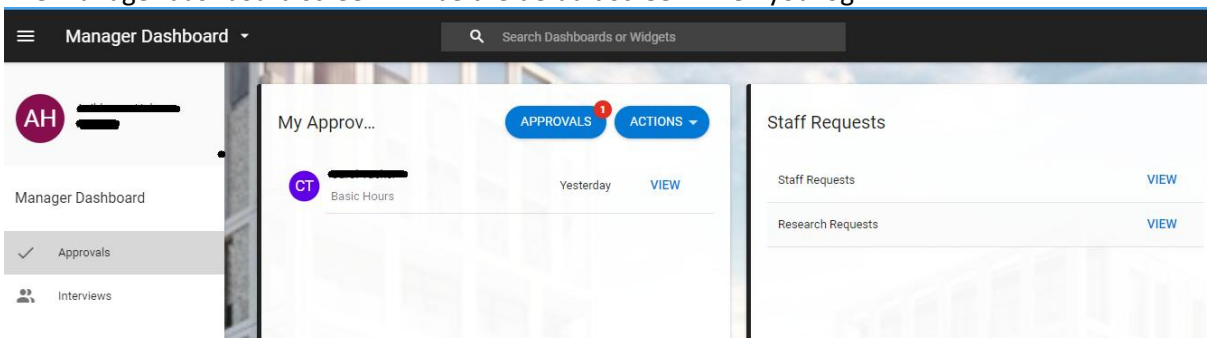
It is also the responsibility of a line manager to manage sick leave. A detailed guide for staff and managers is available on the Human Resources page on the TU Dublin website here https://www.tudublin.ie/for-staff/human-resources/policies--forms/. If you have any queries regarding absence management please contact leaveandbenefits@tudublin.ie.

# 2. Core step-by-step guides

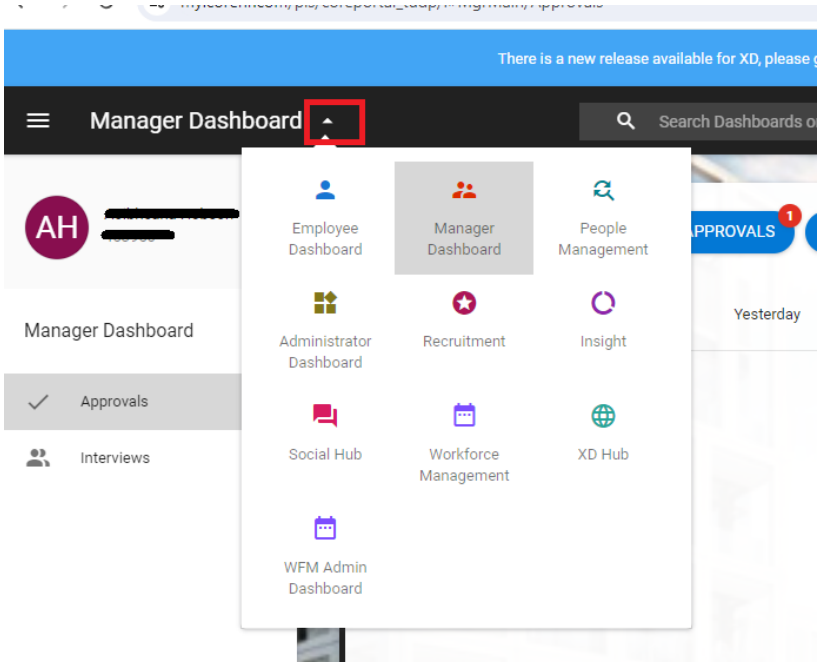
## 2.1 Core Portal – Logging In

TU Dublin now uses Single Sign On to connect to CorePortal. This means your Staff email address and password will log in directly to CorePortal at this link
https://my.corehr.com/pls/coreportal_tudp/

The manager dashboard screen will be the default screen when you log in.

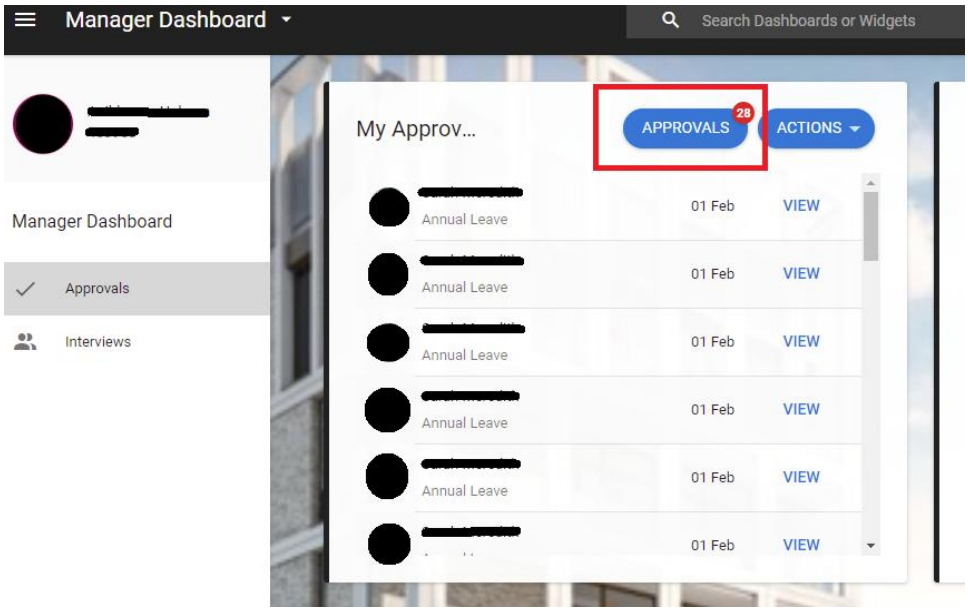



If you need to navigate to a different dashboard, click the arrow on the top left of the screen and select the dashboard from the list

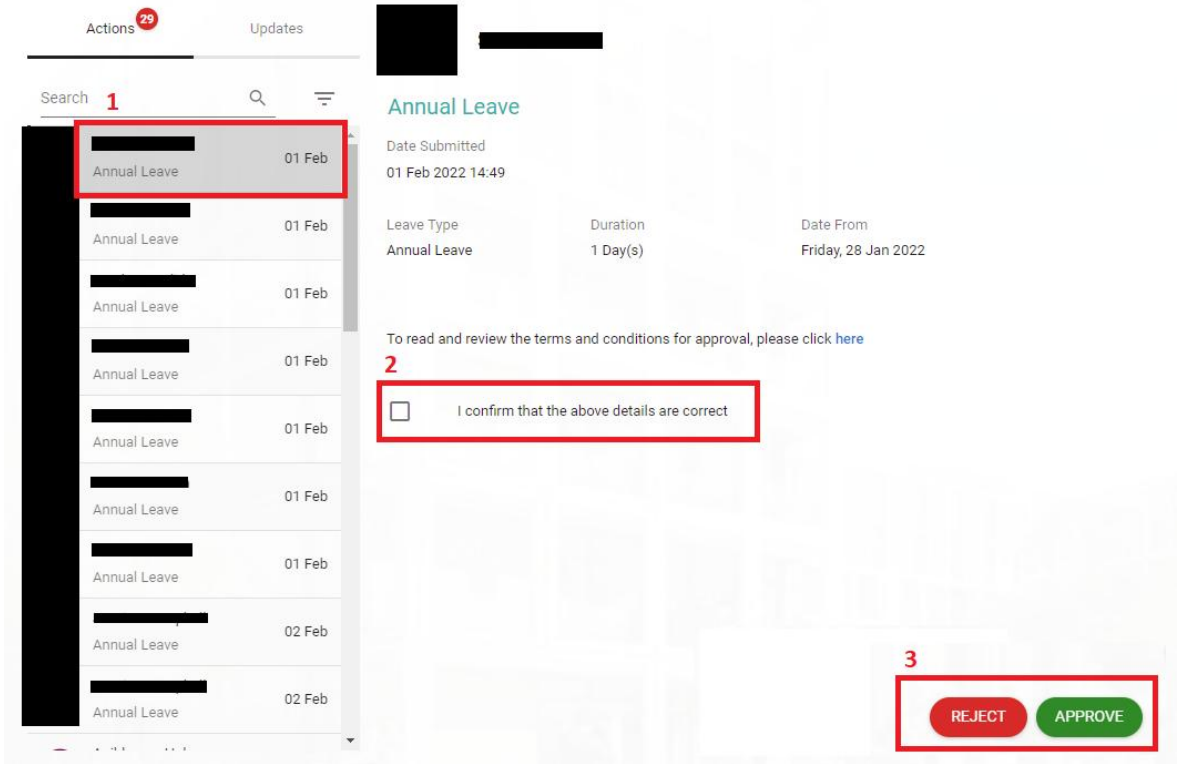


## 2.2 Core Portal – Approving Leave Requests, basic hours and missed clockings

You can see an overview of requests submitted on the home screen in the manager dashboard. Click Approvals to view the details of the requests and approve them.




Select the leave requests you want to approve (1), then tick the box confirming the details are correct (2), and then click Approve or Reject as appropriate (3).




If leave requests or missed clockings are not approved by the weekly cut off (5pm on the Friday a week after the leave has been taken) you may get a message advising the week is locked.

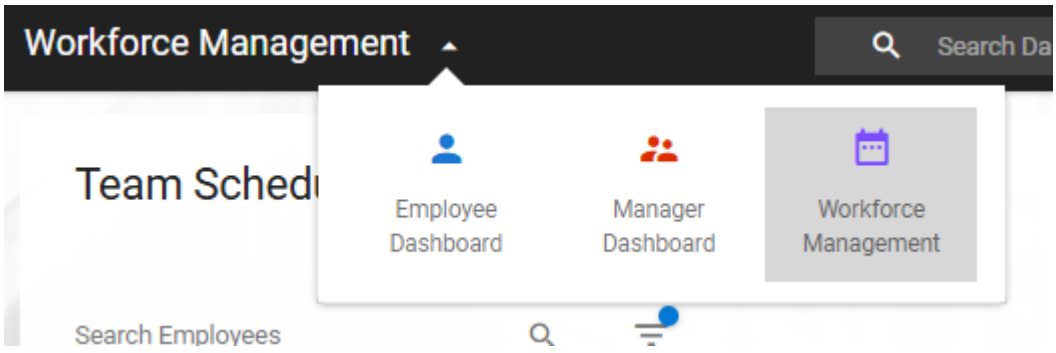
You should click YES to this message but you will then also need to log in to Core Back Office to complete a manual adjustment. See back office section 3.6 below.

## 2.3 Core Portal – Viewing your team member's leave balances & booked leave

To view your teams schedule (e.g. to view booked leave across the team), on the Manager Dashboard, scroll to "My Team" and choose the "View Scheduler" option under the actions menu

This will show you a week by week calendar for your team.

To view the current leave balances for your team members select the Workforce Management Dashboard from the dashboard menu.




Choose "Team Balances" from the menu on the left hand side and you can view the current balance details for your team members.

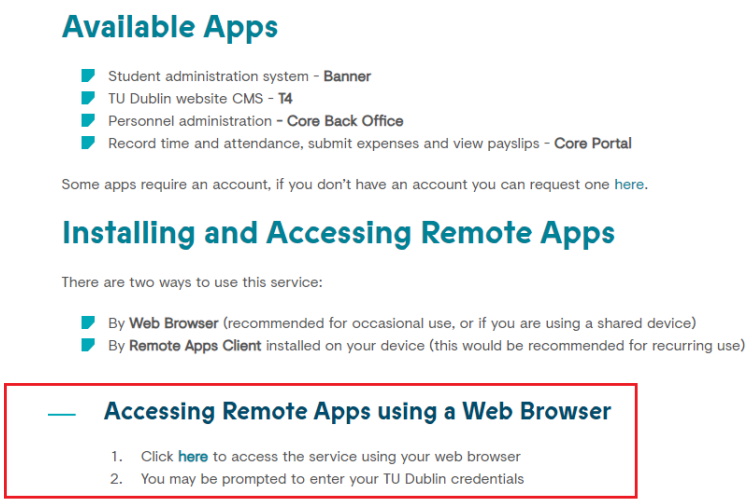
Team Balances
Search Team Member
Team Member
Job Title
Department
Annual Leave
Parental Leave
Flexi Leave
[redacted]
Administrative Officer
[redacted]
6.5 DAYS
1.21 HOURS
[redacted]
Staff Officer 4
[redacted]
3.5 DAYS
7.18 HOURS
[redacted]
Senior Staff Officer
[redacted]
4 DAYS
-4.34 HOURS

## 3.1 Core Back Office – Logging In

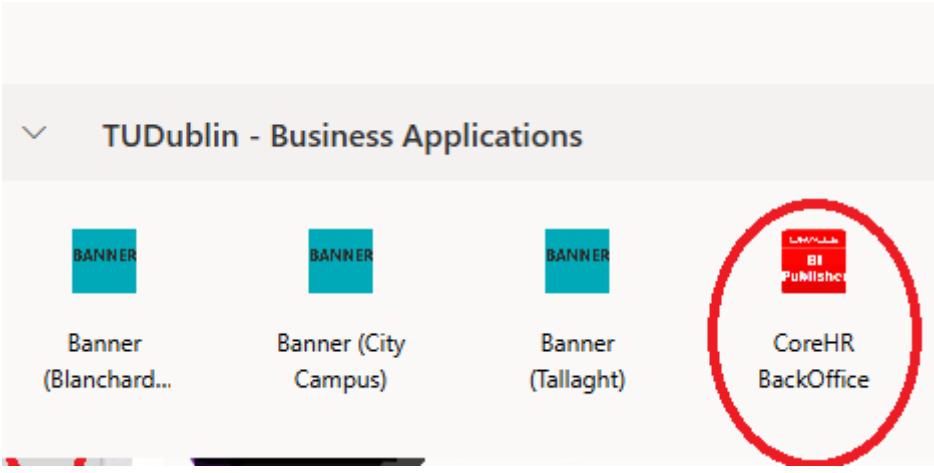
CoreHR Back Office is used to make manual adjsutments.

Please note: If you are working remotely you may need to contact Technology Services to arrange access to the Back Office on your laptop. Details on how to log a case with the Support Desk can be found on the website here: Need IT Support? | TU Dublin

To login in go to https://www.tudublin.ie/connect/technology-services/software/avdstaff/ and go to Accessing Remote Apps using a Web Browser.
Click 'here' to connect. If you are asked for login or password at this point then it is your Staff email address and password that is required.




Once your credentials are verified, you will be brought to the Remote Apps page. Select CoreHR Back Office from the Business Applications.

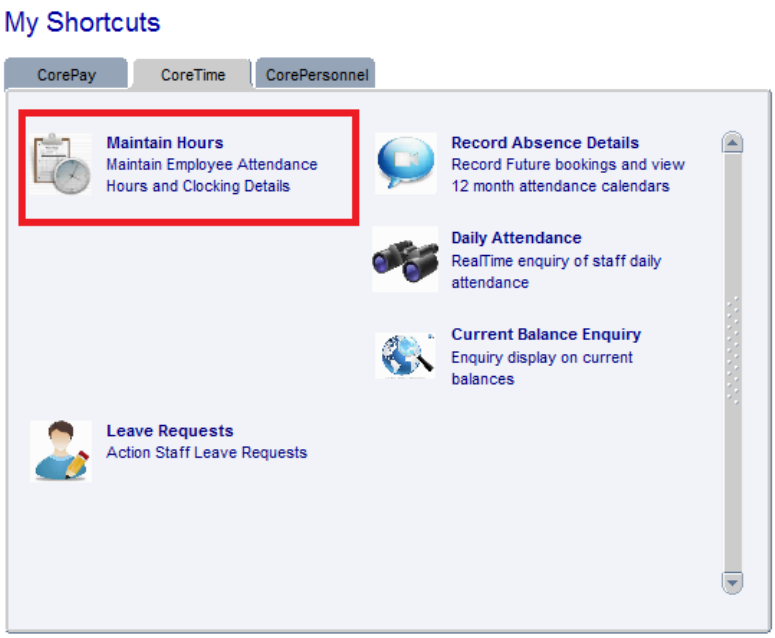


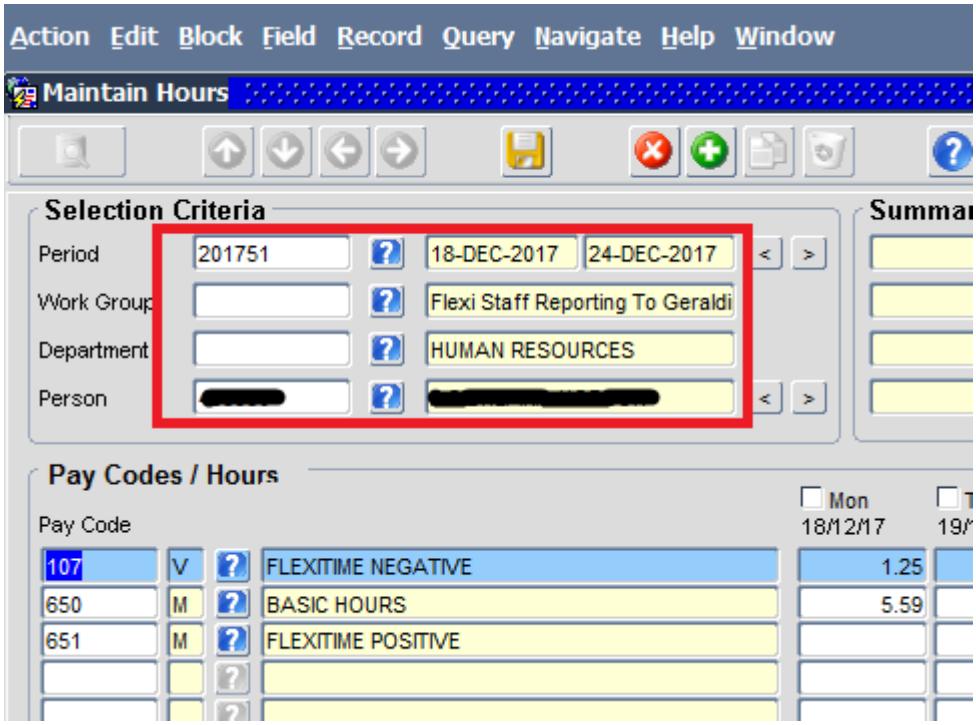

In the pop up box enter your Core back office username, password and enter TUDP for the database. Note: Please contact technology services if this pop up does not appear or if there are any issues with opening CoreHR on your PC. If you have forgotten your back office password please contact corehr.support@tudublin.ie.

Logon
Username:
Password:
Database:
Connect
Cancel

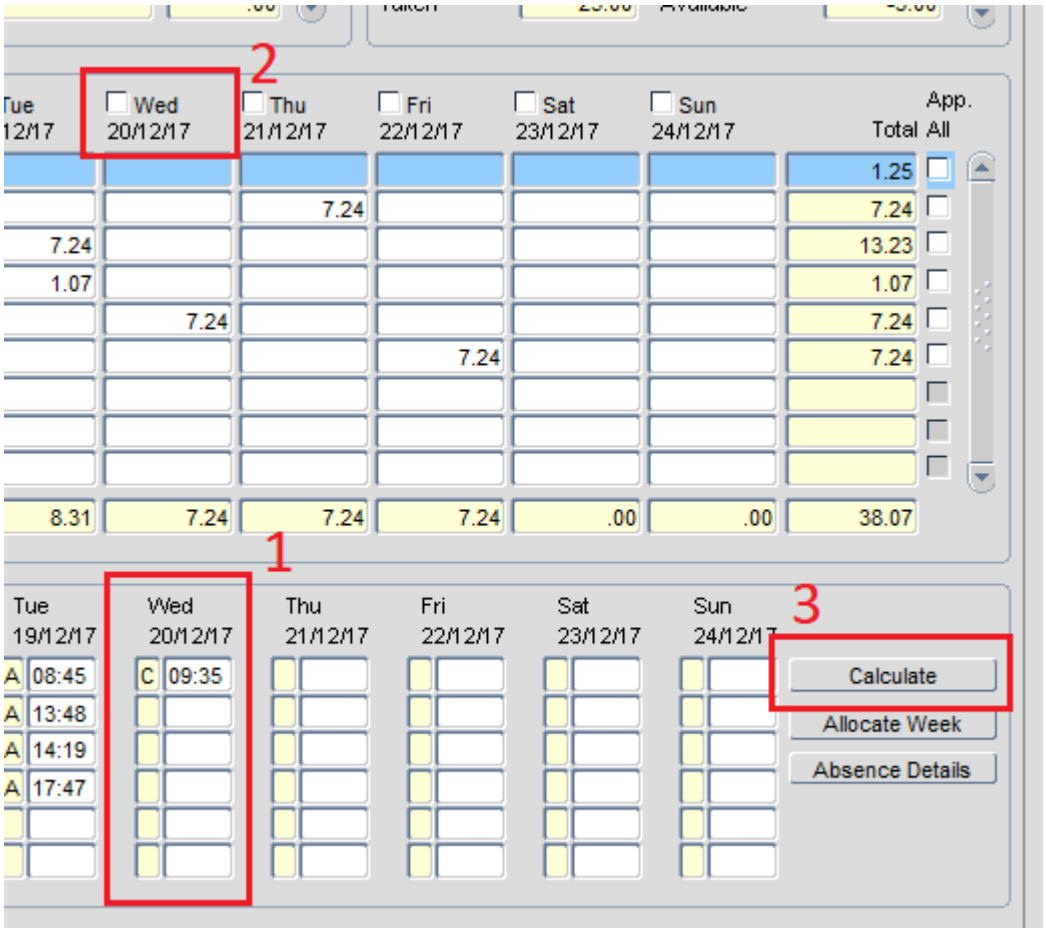
## 3.2 Core Back Office – Manual Clockings

Click on the Core Time Menu and go to the maintain hours screen. Choose the staff member in question and select the date range (time period) you want.



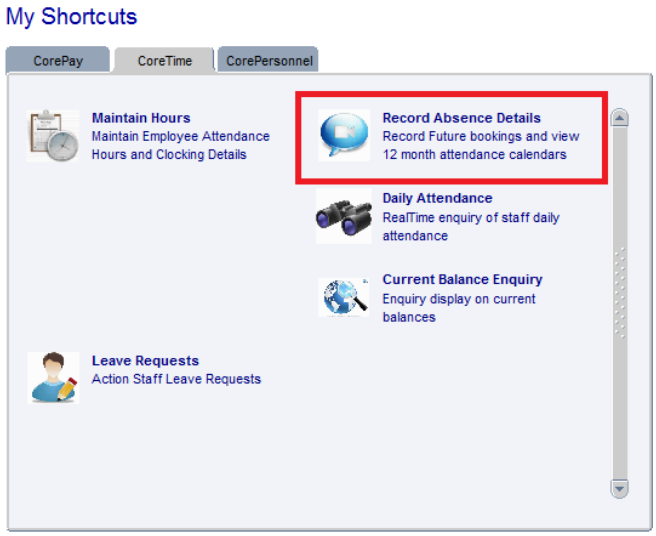
If you need to enter manual clockings then enter the correct time/s (1), makes sure the box beside the date is unticked (2) and hit calculate (3). It is important to note here that clockings must be entered in chronological order or they will not calculate correctly.

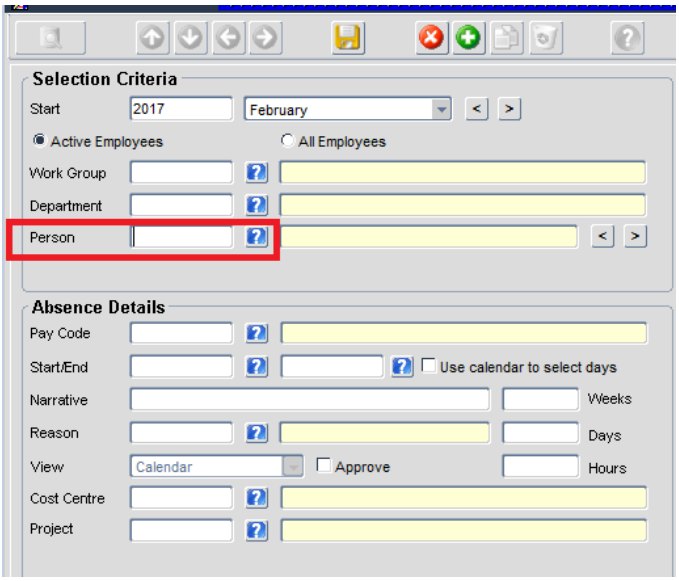


## 3.3 Core Back Office - Entering Leave, dental or medical appointments manually

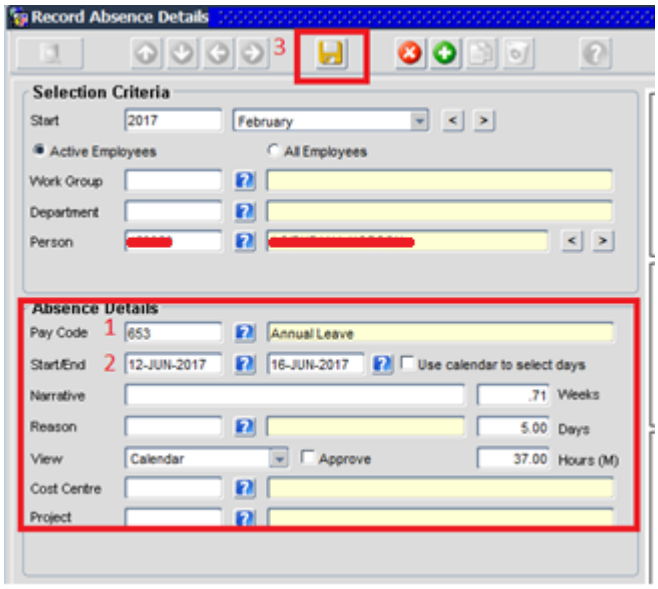
Some leave cannot be requested through Core Portal so it needs to be entered manually, examples of this include Sick Leave for Academic staff and Time in Lieu.

To input leave, in the CoreTime Tab go to the Record Absence Details screen and select the staff member in question.

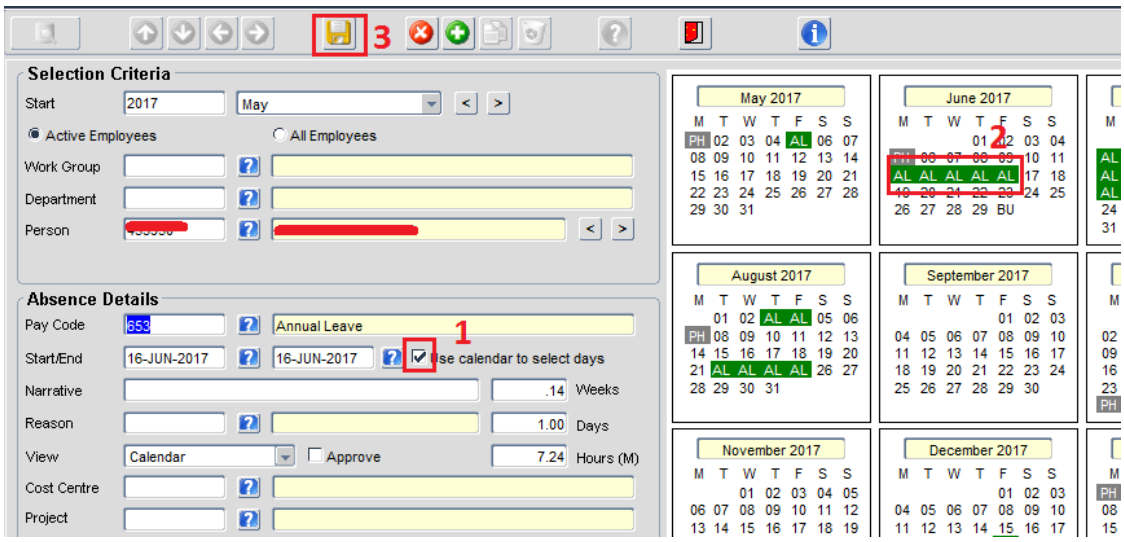


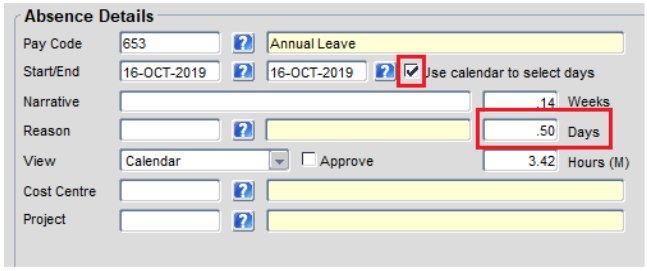
Select the type of leave to be entered (1), the dates of the leave (2) and save (3).



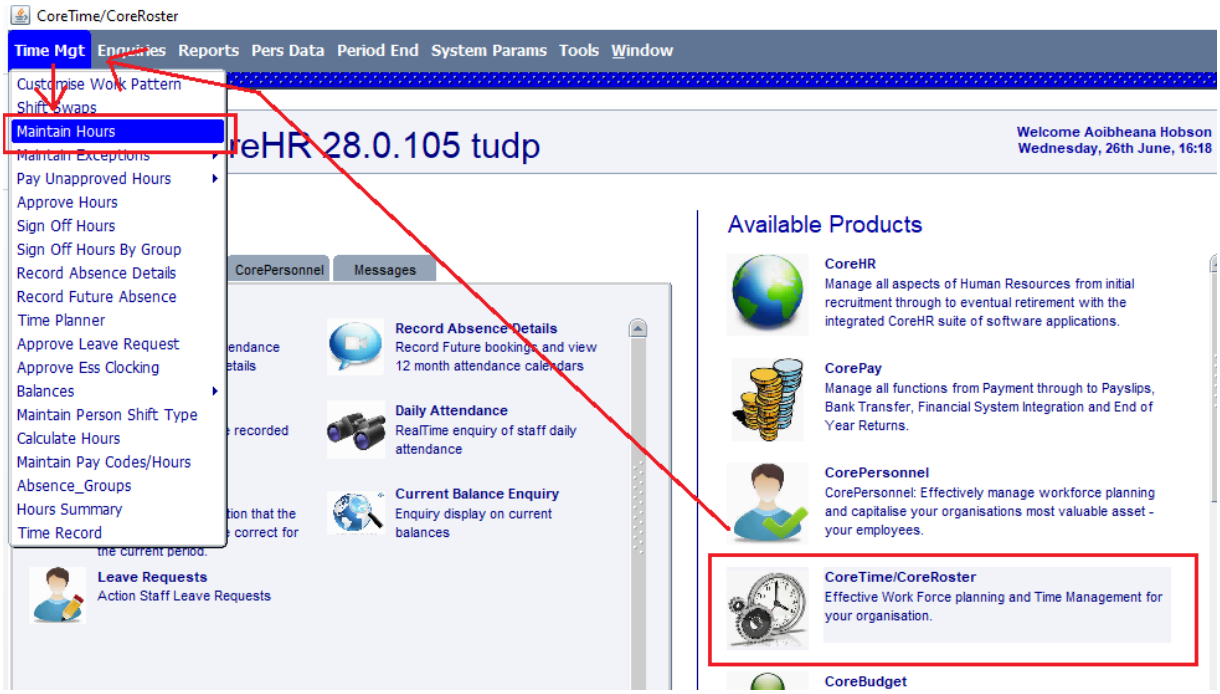

Alternatively, leave the dates blank and tick the 'Use calendar to select days' box (1). Then select the correct dates by clicking on the 12 month calendar on the right of the screen (2), and save (3).
**Note: using the calendar to select the day should only be used when inputting single days of leave.**



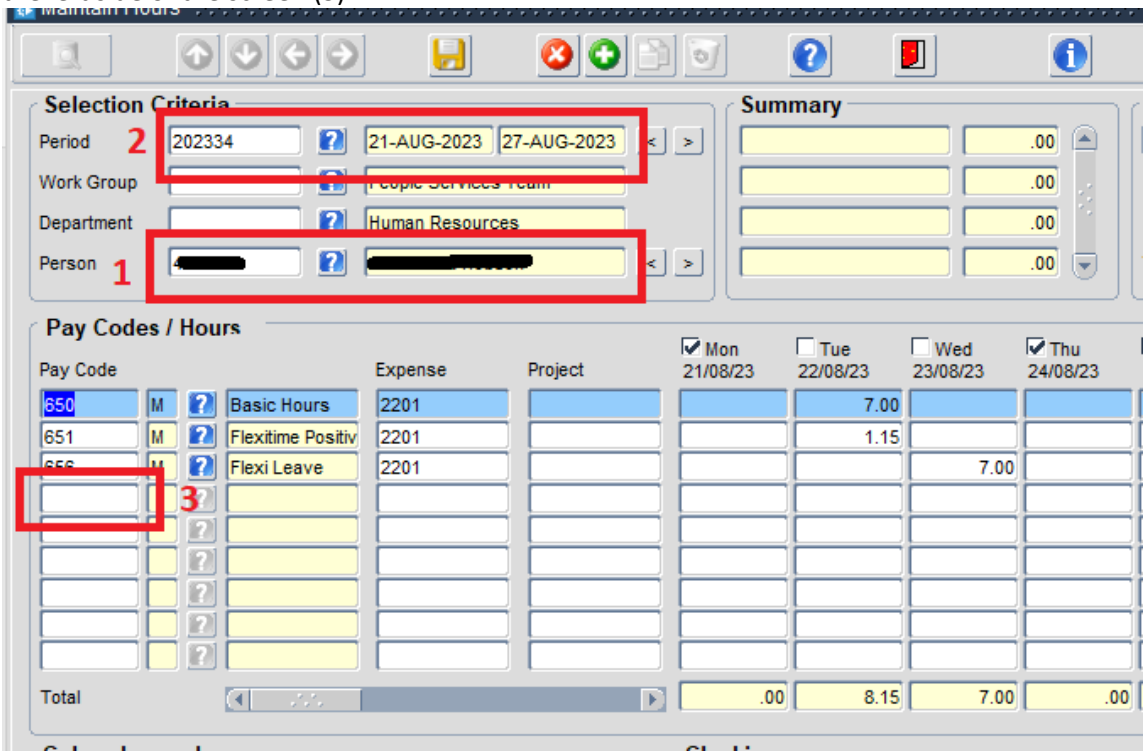

Note: if you are entering a half day leave, follow the step as described in step 2 above but make sure to enter .5 in the box beside 'Days'.



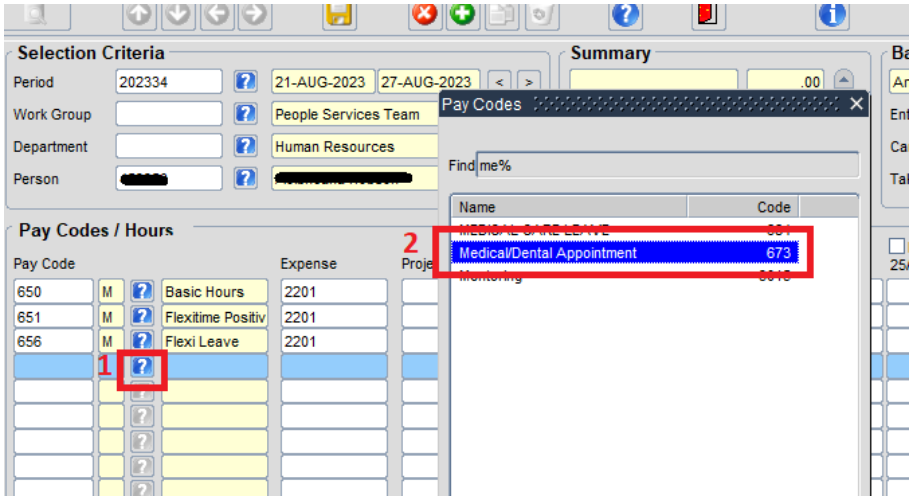
To enter a medical or dental appointment, go to CoreTime and select Maintain Hours from the Time Mgt drop down menu.



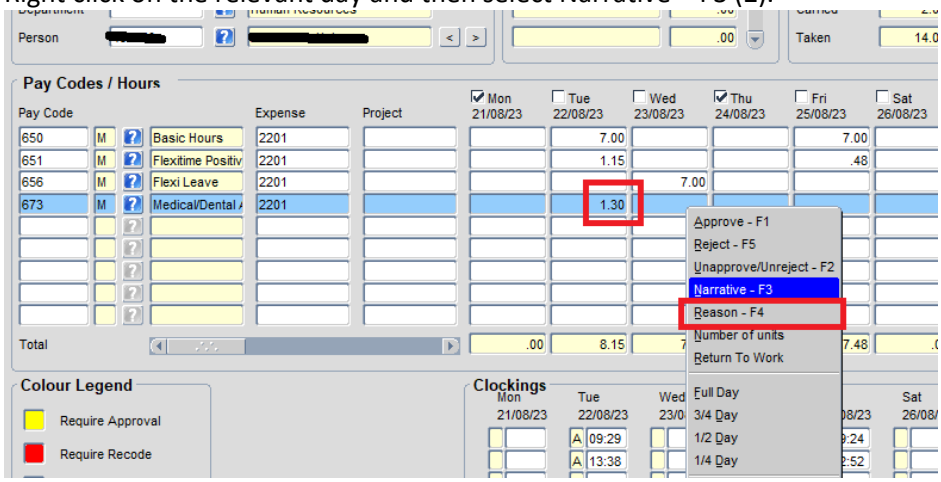

In this screen select the Person (1), the relevant week (2), and then click on the first empty box on the left side of the screen (3).



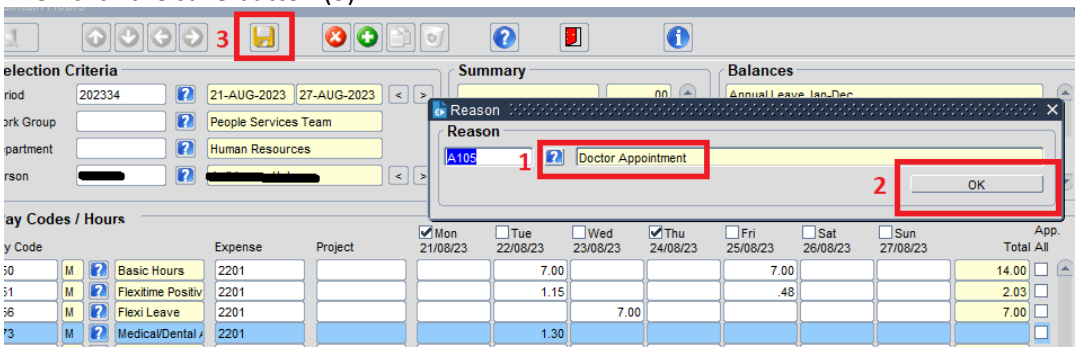

Click on the question mark (1) and then select Medical/Dental Appointment from the drop-down menu.



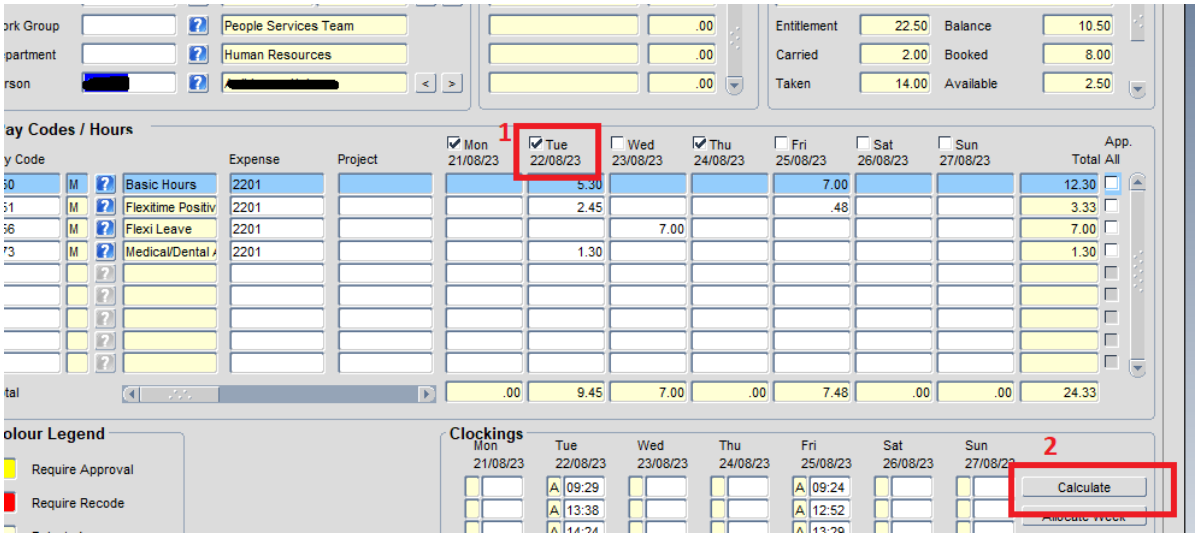

Enter the time allocated for the appointment (1).
Please note this time is entered as hours and minutes, in the example above 1.30 is 1 hour and 30 mins.
The maximum time allowed for a medical appointment is 2 hours and 30 minutes during core hours (10am-4pm). Time should not be credited for appointments attended before 10am or after 4pm.
Right click on the relevant day and then select Narrative – F3 (2).




In the box that appears select either Doctor Appointment or Dentist Appointment as appropriate (1) and then click ok (2).
Then click the save button (3).




If the hours don't automatically recalculate when you click save, make sure the box beside the relevant date is unticked (1) and then click calculate (2).


People Services Team
Human Resources
Entitlement 22.50
Carried 2.00
Taken 14.00
Balance 10.50
Booked 8.00
Available 2.50
ay Codes / Hours
1
Mon 21/08/23
Tue 22/08/23
Wed 23/08/23
Thu 24/08/23
Fri 25/08/23
Sat 26/08/23
Sun 27/08/23
Total
App. All
Basic Hours 2201 5.30 7.00 12.30
Flexitime Positiv 2201 2.45 .48 3.33
Flexi Leave 2201 7.00 7.00
Medical/Dental 2201 1.30 1.30
.00 9.45 7.00 .00 7.48 .00 .00 24.33
olour Legend
Require Approval
Require Recode
Clockings
Tue 22/08/23 A 09:29 A 13:38
Fri 25/08/23 A 09:24 A 12:52
2
Calculate

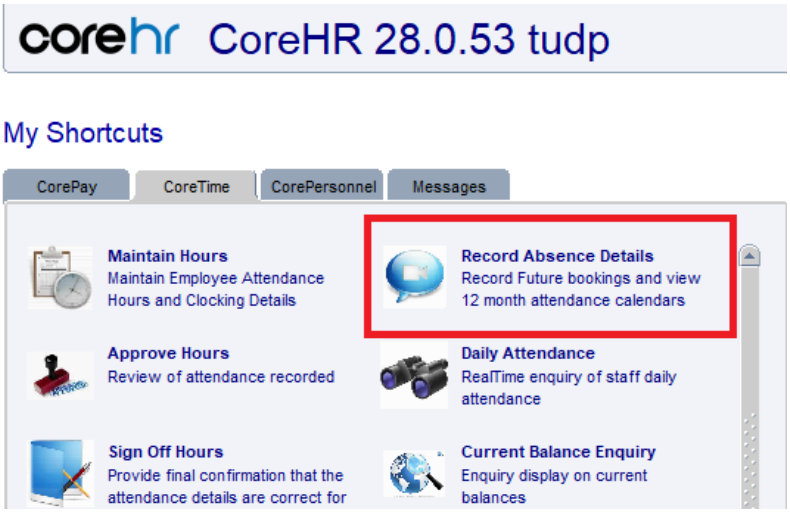
## 3.4 Core Back Office - Deleting a leave request that has already been approved

When a leave request has been approved through core portal it can only be removed from the core record by deleting it from the Record Absence Details screen in back office.

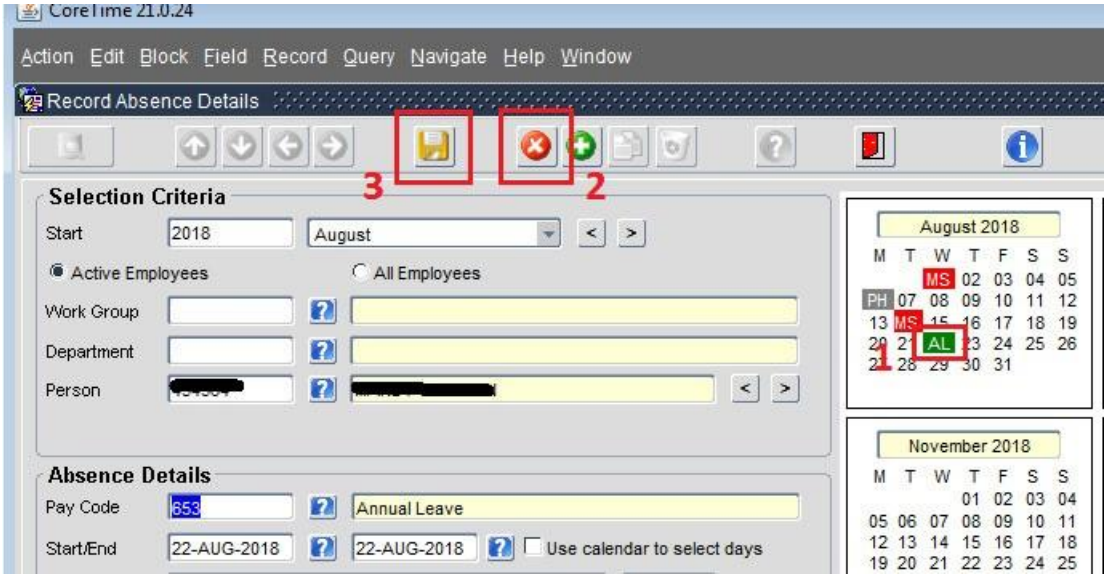
If the dates need to be amended but not removed entirely please see: 3.5 Editing a leave request that has already been approved.

Note: if a staff member requests leave and after the request has been approved they want to change it to a different type of leave (e.g. changing annual leave to sick leave), you will need to delete the leave and then re-enter the new leave.

In the CoreTime tab go to the record absence details screen.



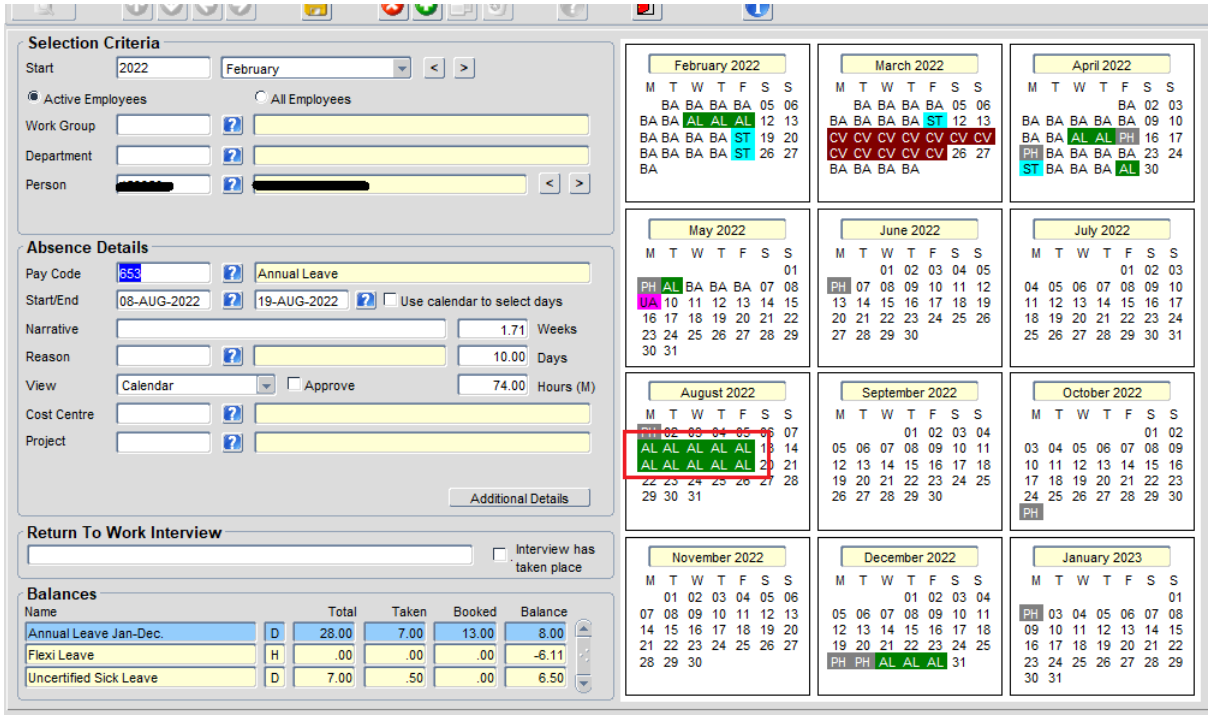

In the record absence details screen select the staff member.
Click once on the date you wish to delete (1), press the red X (2) to delete the leave and thenpress save (3).
Note: If the leave was booked in one block this will remove the whole absence. If the leave was booked through multiple requests then the second step will need to be repeated for the dates covered by each request.



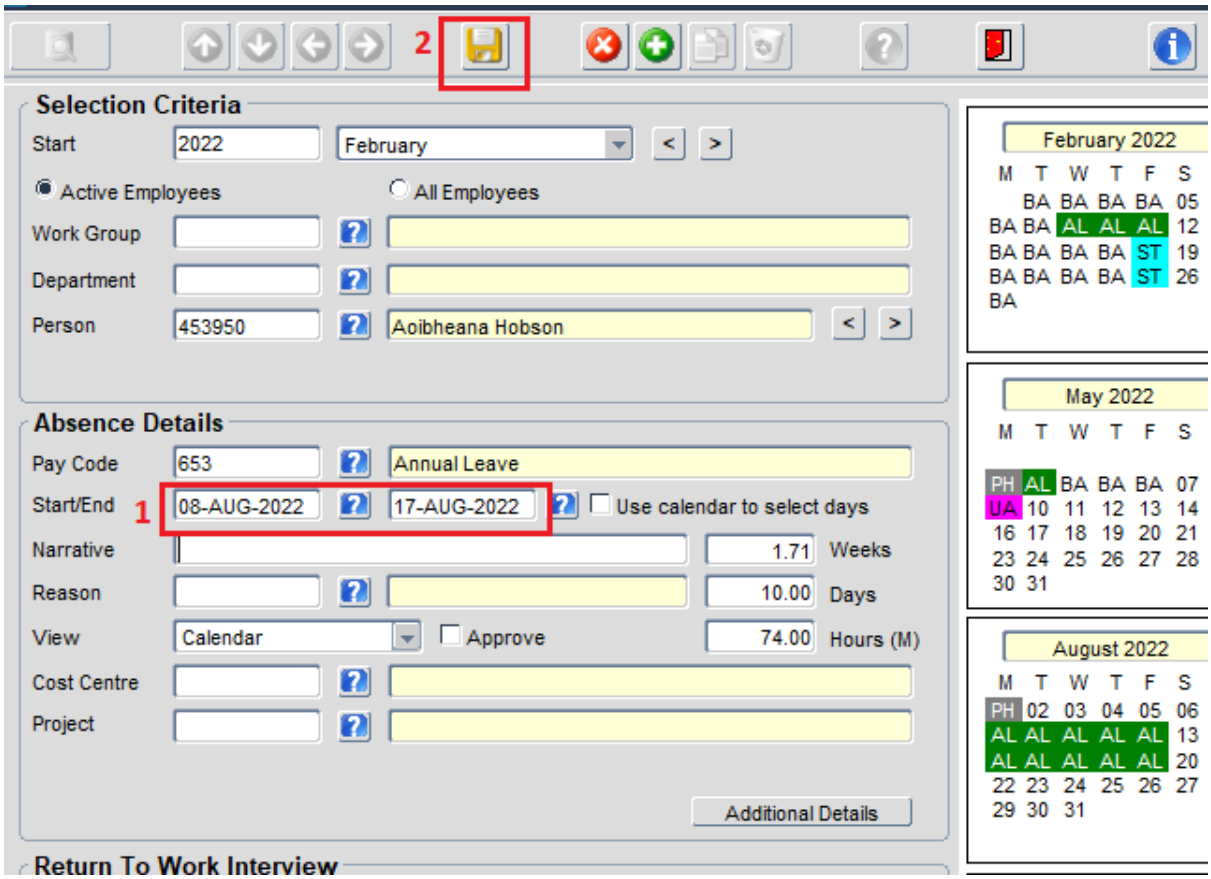

## 3.5 Core Back Office- Editing a leave request that has already been approved

If a leave request has been approved and the dates now need to be amended they can be changed in the Back Office.

In the record absence details screen select the staff member.
Select the leave on the calendar by clicking it once.


Selection Criteria
Start
2022
February
Active Employees
All Employees
Work Group
Department
Person
Absence Details
Pay Code
653
Annual Leave
Start/End
08-AUG-2022
19-AUG-2022
Use calendar to select days
Narrative
1.71
Weeks
Reason
10.00
Days
View
Calendar
Approve
74.00
Hours (M)
Cost Centre
Project
Additional Details
Return To Work Interview
Interview has taken place
Balances
Name
Total
Taken
Booked
Balance
Annual Leave Jan-Dec.
D
28.00
7.00
13.00
8.00
Flexi Leave
H
.00
.00
.00
-6.11
Uncertified Sick Leave
D
7.00
.50
.00
6.50
February 2022
March 2022
April 2022
May 2022
June 2022
July 2022
August 2022
September 2022
October 2022
November 2022
December 2022
January 2023

Enter the new dates (1) and press enter. Then press save (2). The dates will now be updated.

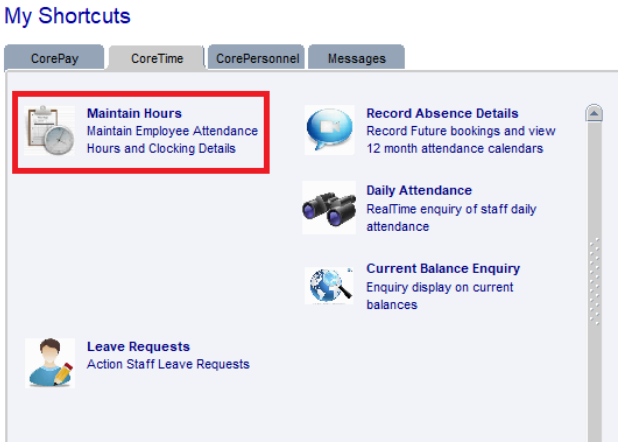


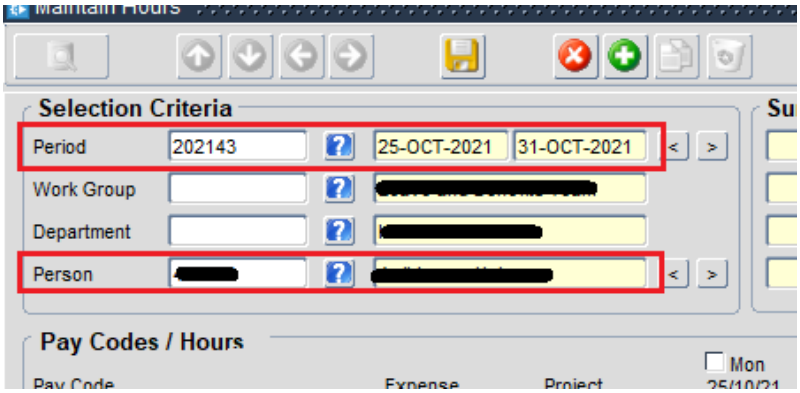
## 3.6 Core Back Office - Removing incorrect unapproved absences/missed clockings

If leave requests or missed clockings are not approved by the weekly cut off (5pm on the Friday a week after the leave has been taken) it will be recorded correctly but the unapproved absences or missed clocking will remain on the clock.

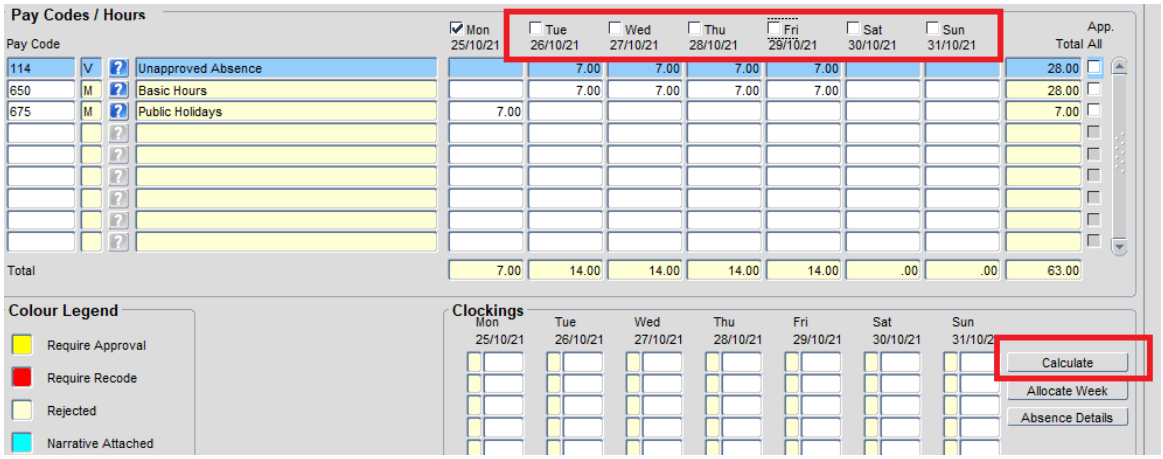
Access the Maintain Hours screen to make the amendment. This is done either by going to the Core Time tab (if you have accessed the screen previously) or by navigating via the menus at the top to Core Time -> Time Management -> Maintain Houses.

Select the staff member and week in question.



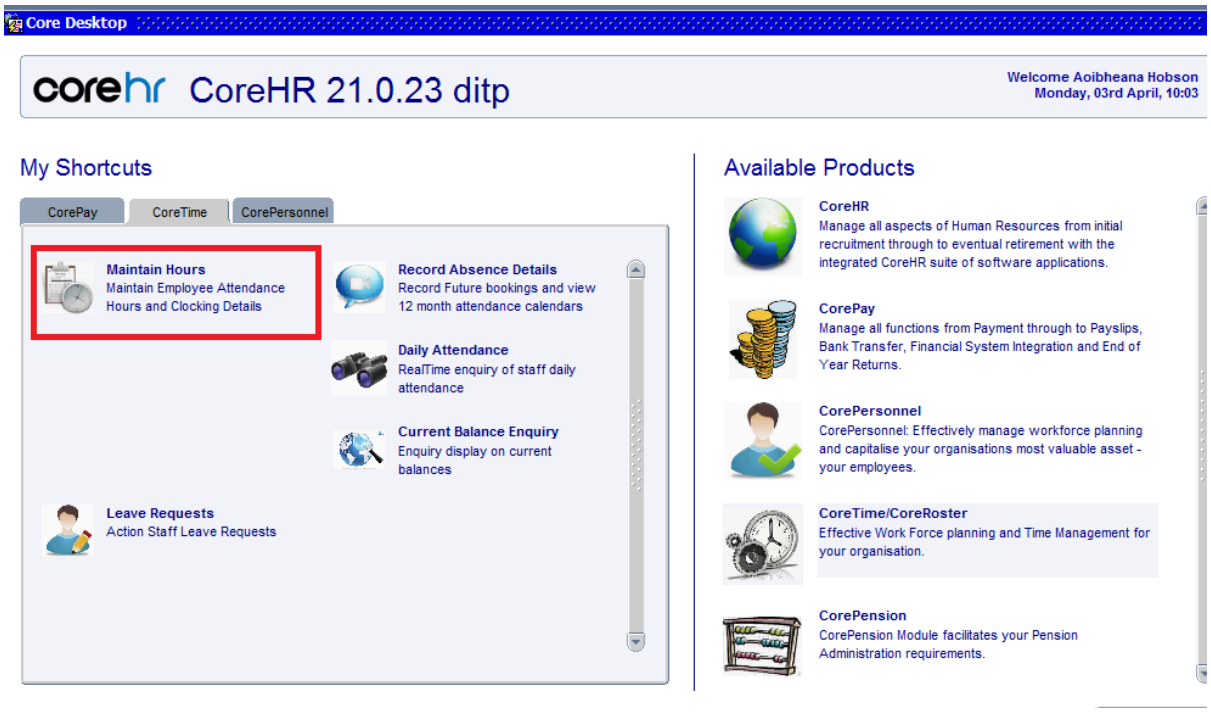

Make sure the boxes beside the relevant dates are unticked and then press calculate. This will remove the missed clocking/unapproved absences but retain the correct clockings/leave requested.


Pay Codes / Hours
Pay Code
Mon 25/10/21
Tue 26/10/21
Wed 27/10/21
Thu 28/10/21
Fri 29/10/21
Sat 30/10/21
Sun 31/10/21
App. Total All
114 V Unapproved Absence 7.00 7.00 7.00 7.00 28.00
650 M Basic Hours 7.00 7.00 7.00 7.00 28.00
675 M Public Holidays 7.00 7.00
Total 7.00 14.00 14.00 14.00 14.00 .00 .00 63.00
Colour Legend
Require Approval
Require Recode
Rejected
Narrative Attached
Clockings
Mon 25/10/21
Tue 26/10/21
Wed 27/10/21
Thu 28/10/21
Fri 29/10/21
Sat 30/10/21
Sun 31/10/21
Calculate
Allocate Week
Absence Details

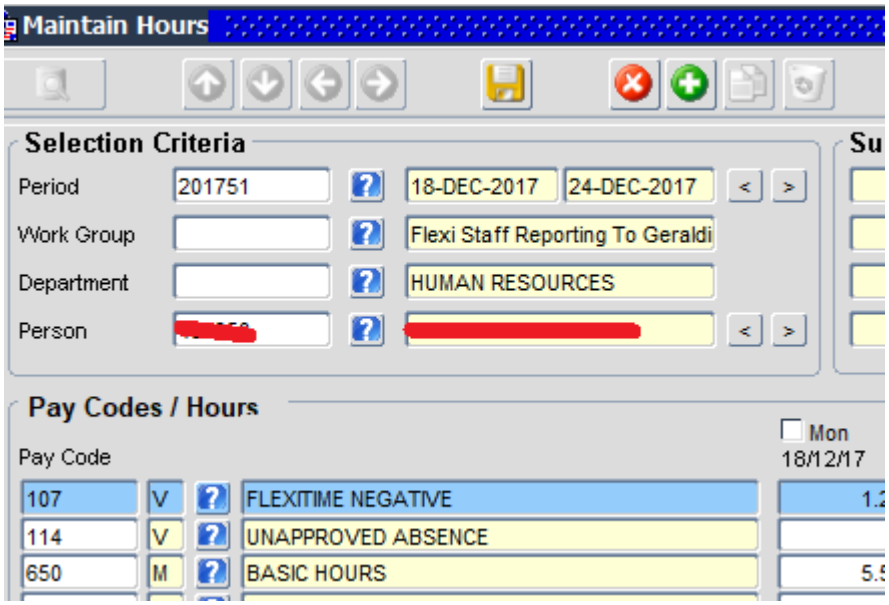
## 3.7 Core Back Office - Deleting Clockings in CoreTime

It is sometimes necessary to delete a clocking e.g. if someone clocks in error or if a missed clocking is entered twice.

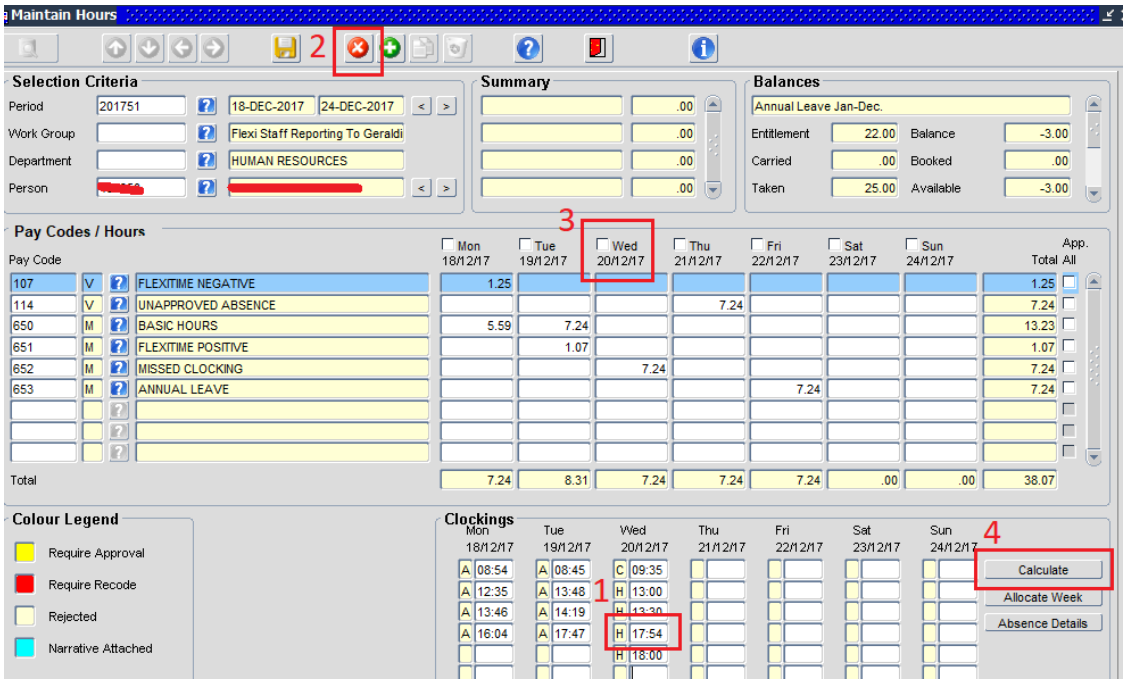
Go in to the maintain hours screen in CoreTime.




Select the person and week required.



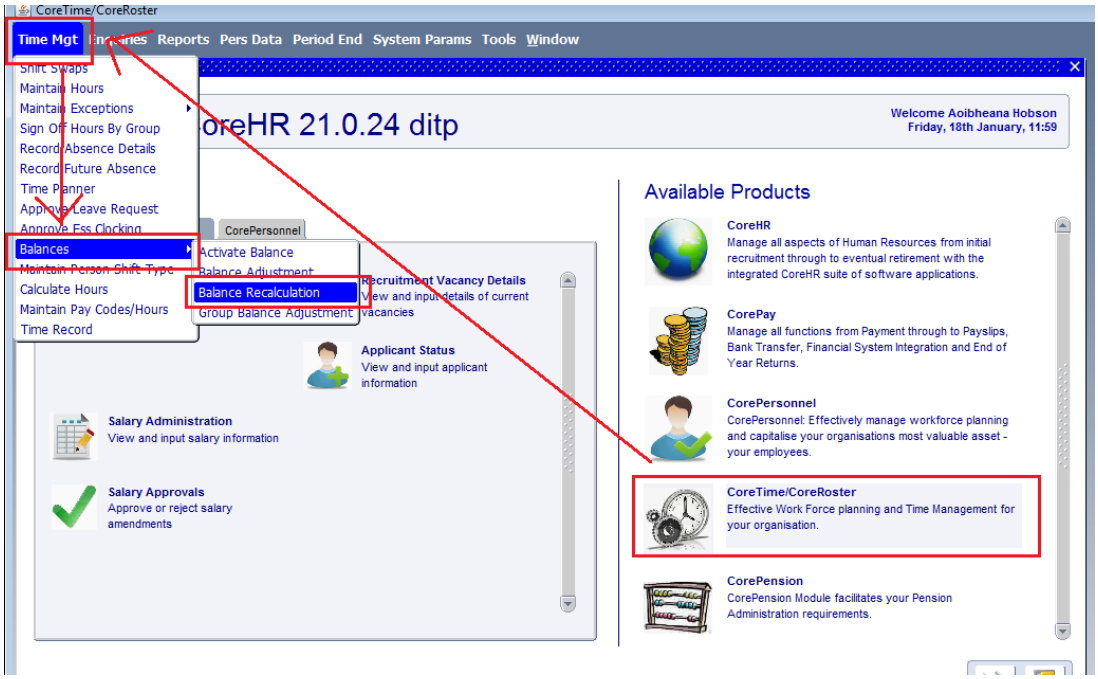
Click on the clocking you want to delete (1) and then click the red ‘X’ at the top of the screen (2). Make sure the box beside the date is unticked (3), then hit the calculate button (3) to recalculate the correct hours.



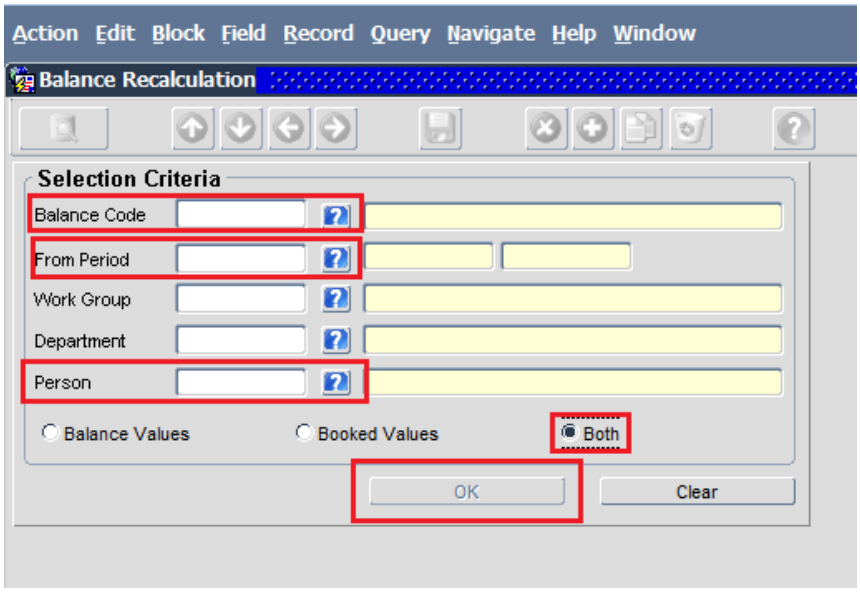
## 3.8 Core Back Office - Recalculating a balance in CoreTime

If an adjustment is made outside the current flexi period core will not automatically update the flexi balance. In this case you will need to run a recalculation.

Select CoreTime/CoreRoster and then select the Time Mgt.
Select Balances and then select Balance Recalculation.




Enter the Balance Code, From Period (the period from which you want the balance recalculated), and Person.
Make sure the “Both” option is selected.
Hit the “OK” button when it becomes available.



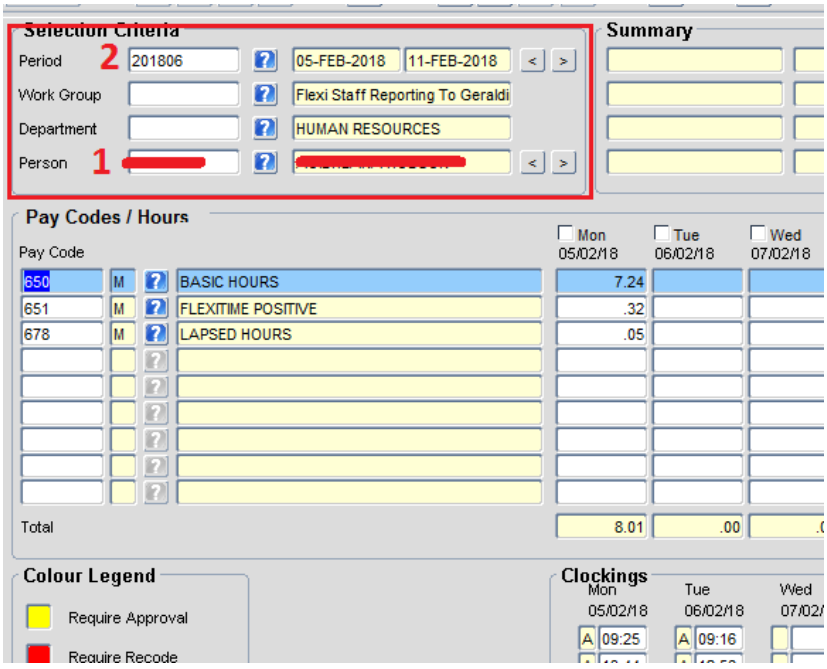

Note: if the balance does not change after the recalculation there may be further manual adjustments required.

## 3.9 Core Back office - Changing a roster in CoreTime

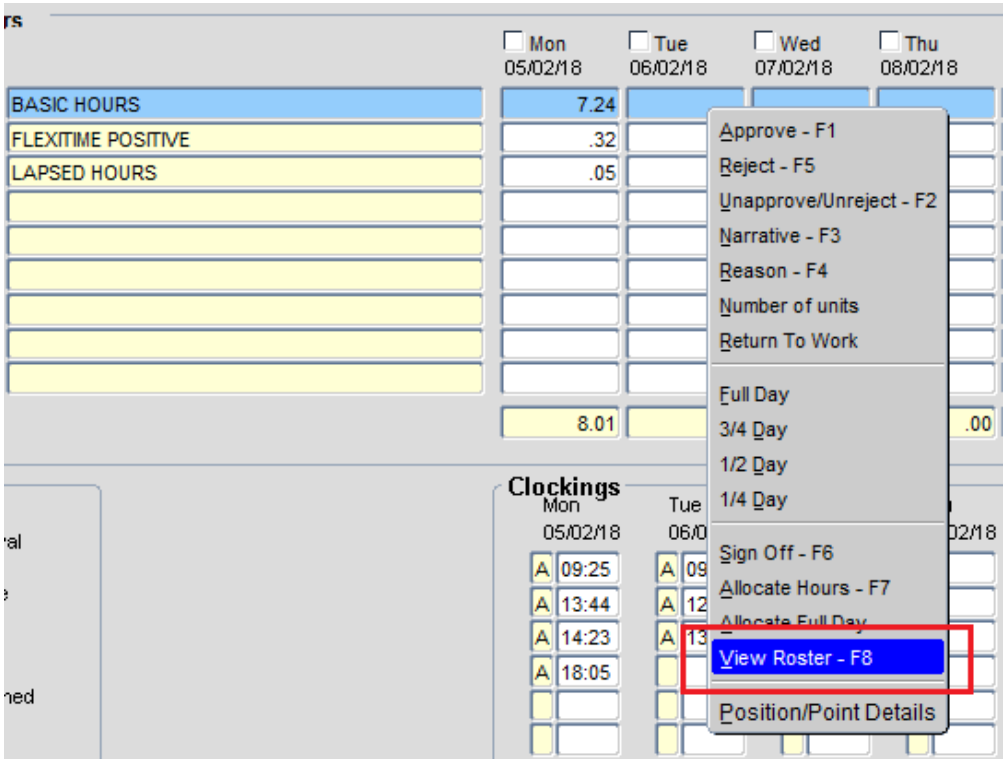
If a staff member does not work full time it may be necessary from time to time to change their roster, e.g, if due to work commitments they need to switch their rest day from a Monday to a Friday.

In CoreTime go to the Maintain Hours screen.

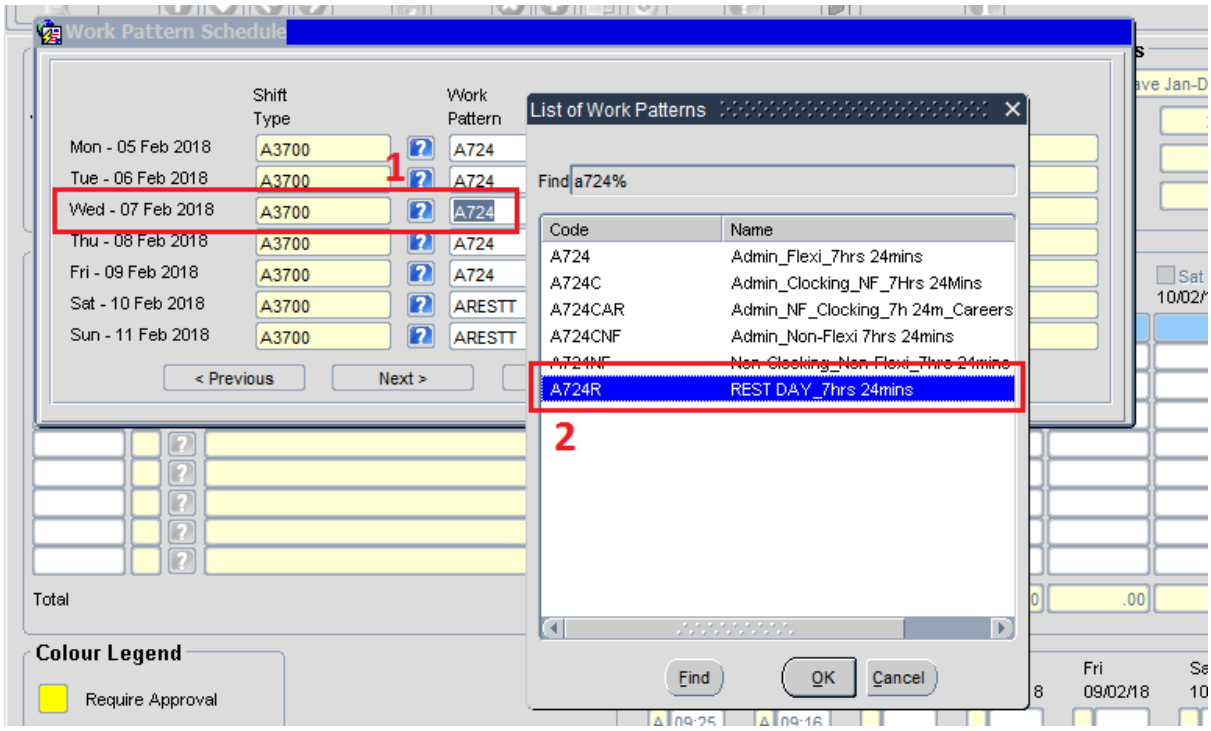
In the maintain hours screen pull up the staff member and date range required.



Right click on any day and select View Roster from the dropdown menu.



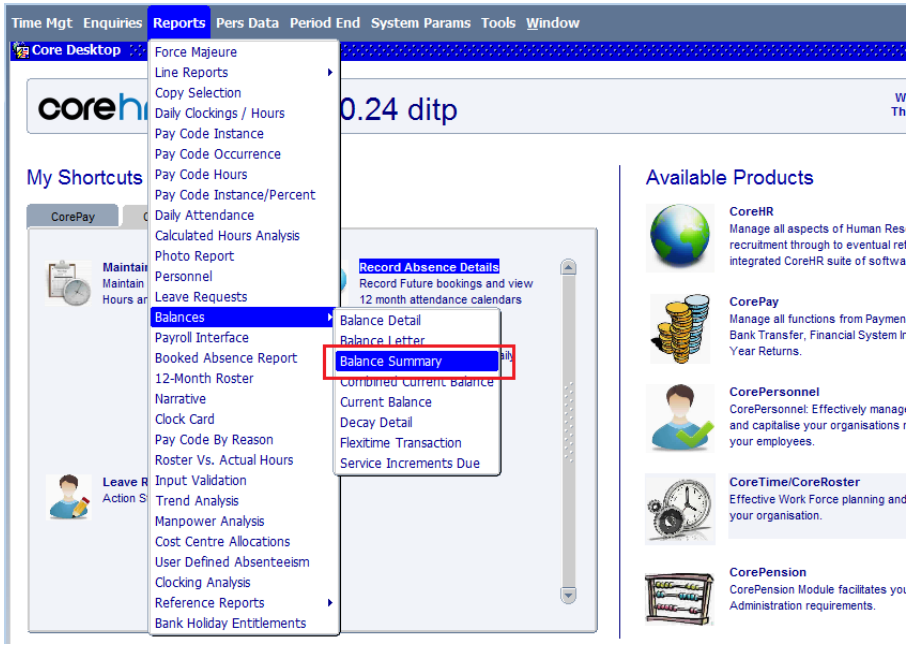

Select the date you want to change (1) and then select the work pattern you want to input (2).
Note: If changing a working day to a rest day (or vice versa) this will usually mean adding/removing the 'R' at the end of the work pattern code. E.g. A724 to A724R as above.



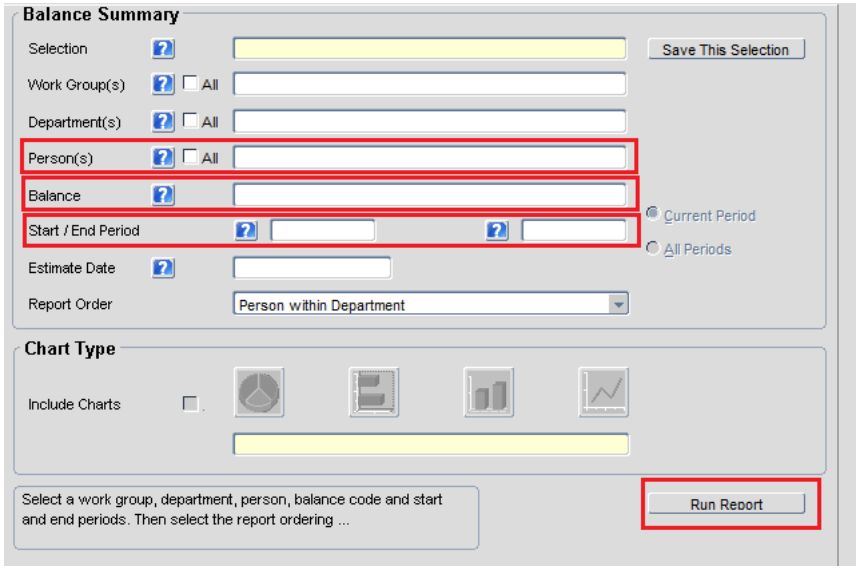
## 3.10 Core Back Office - Running a balance Summary Report.

A balance summary report gives details of the opening balance, hours accrued and the closing balance during a flexi period. Note, you can also see this in Core Portal.

In CoreTime/CoreRoster select Reports, Balances and then Balance Summary from the drop down menu.




In this screen select the staff members, balance and start/end period.
Note: You should select all staff necessary from the drop down list, you don't need to run individual reports.
When selecting the start/end period, you can run the report for a single period or for every period since a certain date. If you want to run the report for a single period, select the same period in both boxes.
Click Run Report.
The report will open in a new window of the default web browser (usually Internet Explorer).



# FAQs

*I cannot connect to remote apps to access Back Office*

If you are asked for login credentials, these will be your email address and password. If you still cannot connect, you can follow the links on the website Technology Services | TU Dublin to either reset your password or log a service request with Technology Services.

*I don't see the correct team members in Core Portal*

Email leaveandbenefits@tudublin.ie to have your team assigned to you.

*I am not getting any leave requests in Core Portal*

Email leaveandbenefits@tudublin.ie to have your team assigned to you.

*I cannot see the manager dashboard in Core Portal*

Email corehr.support@tudublin.ie quoting your staff number to have the issue investigated.

*I get an error saying "No Employee Mapping Found" when logging in to Core Portal*

Email corehr.support@tudublin.ie quoting your staff number to have the issue investigated.