

Aston Staff Portal - Leave Requests Employee Guide

Once you have logged in to Aston Staff Portal you will be taken to your **Employee Dashboard**.

corehr Quick Jump ALICE FISHER

Welcome

Alice Fisher
Trainer, Human Resources

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My Week 01 Aug 2016 - 07 Aug 2016

Mon 1	Tue 2	Wed 3	Thu 4	Fri 5	Sat 6	Sun 7
7.3	7.3	7.3	7.3	7.3	Resting	Resting

My Contracts

503607-1 Trainer

Human Resources Department 1 FTE 01 Aug 2016 Effective Date

Navigation: Welcome, **Leave Requests**, Payment, Expenses

On the Leave Requests Dashboard, you will see Sections for **My Requests** and **My Balances**

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Welcome

Alice Fisher
Trainer, Human Resources

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My Requests [Book Time Off](#) [View All](#)

AUG 04 Annual Leave 2 Day(s) Fri 05th Aug 2016 [Submitted](#)

My Balances

Annual Leave (Ap...	20.00	days
Sickness (Days)	0.00	days
Sickness (Hours)	0.00	hours

Navigation: Welcome, **Leave Requests**, Payment

Please note that if you are also a manager, you will enter the Portal automatically on the Manager's dashboard and will need to switch to the Employee Dashboard.

corehr Quick Jump JAMES BUTCHER

[Employee Dashboard](#) [Manager Dashboard](#) [Administrator Dashboard](#)

Trainer, Human Resources

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My Requests

This section allows you to request leave. It will also show all leave requests you have submitted, and whether they have been approved or not. Here is an overview of what you can do from the My Requests section.

The screenshot shows the 'My Requests' section for Alice Fisher, a Trainer in Human Resources. The interface includes a navigation sidebar with options like 'Welcome', 'Leave Requests', 'Payment', 'Expenses', and 'Training'. The main content area displays a list of requests, with one example highlighted: 'Annual Leave' for 04 days starting on Fri 05th Aug 2016, with a 'Submitted' status. A 'Book Time Off' button and a 'View All' dropdown are also visible. Callouts provide detailed instructions and definitions for the interface elements and request statuses.

Any requests you make will appear here, along with the status of your request.

Click here to book leave.

Click on for more options against each request.

- **View Details** will bring up the full details of the leave request.
- View Team Absence NB: This function is currently disabled
- **Edit Request** allows you to edit your request, but only if it hasn't yet been approved.
- **Cancel Request** allows you to cancel your leave request, but only if it is in the future.

If you have a lot of requests you can use this button to filter your requests by their status.

Requests will have one of the following statuses:

- Submitted – You have requested leave and this is waiting for your manager's approval.
- Approved – Your manager has approved your submitted leave request.
- Rejected – Your manager has not approved your submitted leave request.
- Cancelled – You have cancelled a previously booked leave period.

My Balances

This section shows your balances and will include a balance for Annual Leave. This will be for either **April** or **September** (depending on whether you are support or academic staff) and will show how many annual leave **days** (if you are full time) or **hours** (if you are part time) you have **remaining for the current leave year in a particular job**.

Click on a balance to view more information.

Balance

This shows that for this year the employee has an **Allowance** of 10.5 days.

This employee has **Taken** 1 days leave, this brings their **Balance** to 9.5 days.

They also have 7 days leave **Booked** in the future, so they have 2.5 days left that they can book (**Available Balance** column).

Transactions

This shows more detail, including:

- The Annual Entitlement.
- Any adjustments for starting part way through the year or working part time.
- Any rounding applied (we always round up to the nearest half day).
- A list of leave dates taken.

My Balances	
Annual Leave (Ap...	26.50 days
Sickness (Days)	0.00 days
Sickness (Hours)	0.00 hours

My Balances							
Balances for Employee							
Balance	Appointment	Allowanc...	Carried Ov...	Take...	Balan...	Booke...	Available balanc...
Annual Leave ...		10.50	0.00	1.00	9.50	7.00	2.50
Sickness (Day...		0.00	0.00	0.00	2.50	0.00	2.50
Sickness (Hou...		0.00	0.00	0.00	18.15	0.00	18.15

Transactions for Annual Leave (April in Days) 01-Apr-2016 to 31-Mar-2017							
Date	Description	Reserv...	Annua...	Accru...	Carrie...	Taken	Balance
01/04/2016	Open	0.00	25.00	0.00	0.00	0.00	25.00
01/04/2016	FTE Adjustment		-14.79				
01/04/2016	Rounding		0.29				
29/04/2016	Annual Leave					1.00	

Creating a new annual leave request – Full day/s (Employees with a defined working pattern)

1

From the My Request box, click on the '**Book Time Off**' button.

My Requests

Book Time Off

View All

2

Complete the leave request form

NB: If you have more than one appointment (job) at Aston, select the correct one to book time off from. You may need to book time off against more than one of your appointments.

Select Leave Type
Annual Leave

If booking a half day or in hours, press the button for more options.

Start Date
29/08/17

Appointment
Hr Administrator

End Date
29/08/17

Comments

View Balances

Submit

3

Click Submit

Your annual leave request has now been submitted. You will receive a confirmation email, and your manager will receive a notification that they have a leave request to approve.

When your manager approves/rejects your request you will receive another email. The details for your request will be held in Portal.

NB: All staff who have a defined working pattern should book annual leave in days or half days, regardless whether they are full or part time. Staff who have 'irregular' or undefined working patterns should book annual leave in hours.
Please refer to the General Guidance for more information (available on the intranet).

Creating a new annual leave request – Half day (Employees with a defined working pattern)

1

From the My Request box, click on the 'Book Time Off' button.

My Requests

Book Time Off

View All

2

Complete the leave request form

NB: If you have more than one appointment (job) at Aston, select the correct one to book time off from. You may need to book time off against more than one of your appointments.

Add Leave

Basic Details

Select Leave Type

Annual Leave

If booking a half day or in hours, press the button for more options.



Start Date

23/08/17

Appointment

Hr Administrator

Enter Time



Part Day Leave

Time of day

Morning

If booking a half day or in hours, press the button for more options.

1/2 of a day

Comments

View Balances

Submit

3

Click Submit

Your annual leave request has now been submitted. You will receive a confirmation email, and your manager will receive a notification that they have a leave request to approve.

When your manager approves/rejects your request you will receive another email. The details for your request will be held in Portal.

Creating a new annual leave request – In hours (Employees without a defined working pattern)

1

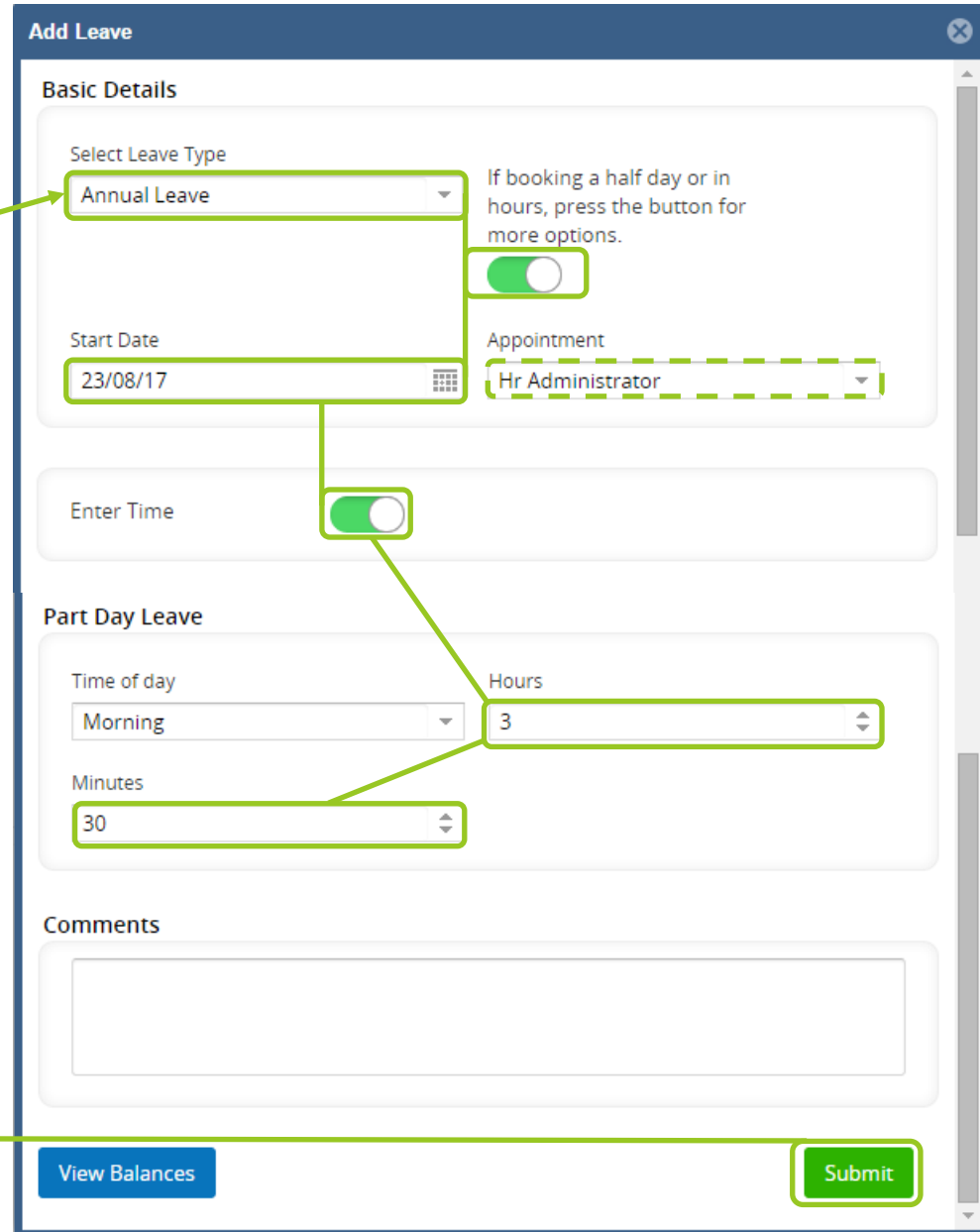
From the My Request box, click on the 'Book Time Off' button.



2

Complete the leave request form

NB: If you have more than one appointment (job) at Aston, select the correct one to book time off from. You may need to book time off against more than one of your appointments.

A screenshot of the "Add Leave" form. The form is titled "Add Leave" and has a close button in the top right. It is divided into sections: "Basic Details", "Enter Time", "Part Day Leave", and "Comments". In the "Basic Details" section, there is a "Select Leave Type" dropdown menu with "Annual Leave" selected, a "Start Date" field with "23/08/17", and an "Appointment" dropdown menu with "Hr Administrator" selected. There is a toggle switch for "Enter Time" which is turned on. In the "Part Day Leave" section, there is a "Time of day" dropdown menu with "Morning" selected, and "Hours" and "Minutes" dropdown menus with "3" and "30" selected respectively. At the bottom of the form, there are "View Balances" and "Submit" buttons. Green callouts from the text boxes point to the "Book Time Off" button, the "Annual Leave" dropdown, the "Start Date" field, the "Appointment" dropdown, the "Enter Time" toggle, the "Hours" dropdown, and the "Submit" button.

3

Click Submit

Your annual leave request has now been submitted. You will receive a confirmation email, and your manager will receive a notification that they have a leave request to approve.

When your manager approves/rejects your request you will receive another email. The details for your request will be held in Portal.

Amending an existing annual leave request

You are able to amend an annual leave request, **as long as it has not already been approved by your manager**. If you need to change an annual leave request after it has been approved, you will need to cancel and submit a new request. You may want to notify your manager that this is what you are doing.

1

From the My Request box.

- Find the correct request.
- Click on the action button to the right.
- Select 'Edit Request'.

My Requests

Book Time Off View All

AUG Annual Leave

04

2 Day(s)

Fri 05th Aug 2016

Submitted

- View Details
- View Team Absence
- Edit Request**
- Cancel Request

2

Make your amendments and then click **Submit**.

When your manager logs into Portal they will see the request with the amended date.

The details for your request will be held in Portal.

Add Leave

Annual Leave the slider to the left. If booking a half day or in hours, slide the slider to the right.

Start Date: 08/08/16 Appointment: Trainer

End Date: 08/08/16

Comments

View Balances Cancel Request **Submit**

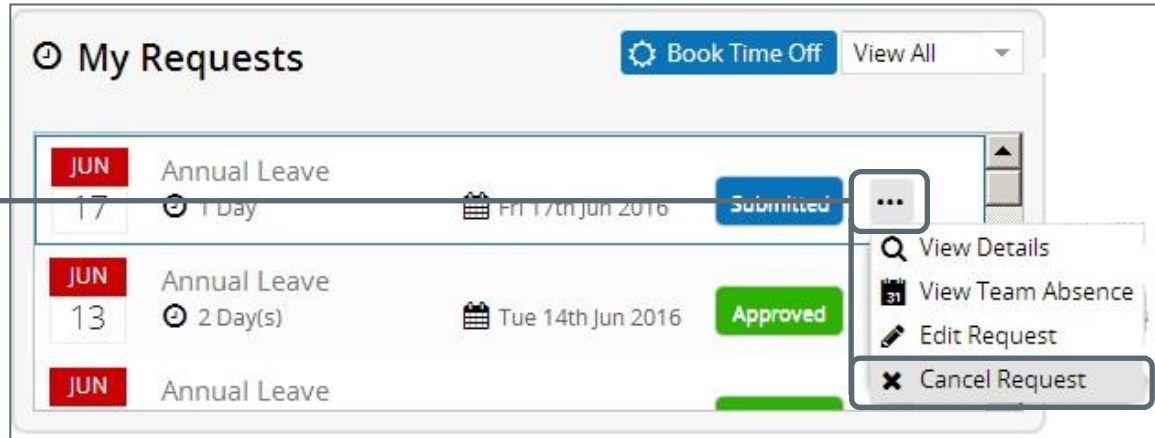
Cancelling an annual leave request

You are able to cancel an annual leave request, **as long as it is the future**. If you need to amend/cancel an annual leave request in the past you will need to ask your manager to do this on your behalf.

1

From the My Request box

- Find the correct request
- Click on the action button to the right of the request
- Select 'Cancel Request'



The screenshot shows the 'My Requests' interface. At the top, there is a 'Book Time Off' button and a 'View All' dropdown menu. Below this, there is a list of requests. The first request is highlighted with a blue border. It is for 'JUN' (June), 'Annual Leave', for '17' (the 17th), for '1 Day', on 'Fri 17th Jun 2016', and has a status of 'Submitted'. To the right of this request is a three-dot menu button. A dropdown menu is open from this button, showing options: 'View Details', 'View Team Absence', 'Edit Request', and 'Cancel Request'. The 'Cancel Request' option is highlighted with a grey background.

2

Your request has now been cancelled.

You will receive a confirmation email, and your manager will receive a notification to say that this has been cancelled.

The details of your cancelled leave will be held in Portal and you will see the updated status next to it.



The screenshot shows the 'My Requests' interface after the cancellation. The first request is now highlighted with a red border. It is for 'JUN' (June), 'Annual Leave', for '17' (the 17th), for '1 Day', on 'Fri 17th Jun 2016', and has a status of 'Cancelled'. The three-dot menu button is now greyed out. The other requests in the list remain unchanged.