

# Manager Guide to Approving Annual Leave in Aston Staff Portal

## Approving Leave Requests

1 On the Manager Dashboard, Click on the tab called **Approvals**.

You will have a box within this with a list of all outstanding leave requests called My Approvals.

You can filter approvals using the **filter** button if you have a lot of requests to approve.

You can use the **...** symbol to view your **leave approval history**. This will show all requests you have approved/rejected.

The screenshot shows the user interface for Margaret Simpson, a Zumba Instructor in Human Resources. The dashboard includes a navigation menu on the left with 'My Team' and 'Approvals' (highlighted with a red box). The main content area is divided into 'My Approvals' and 'Delegation'. The 'My Approvals' section contains a table of leave requests:

Leave Requests	Submitted 13 days ago
<b>Jay Price</b> Systems Specialist Human Resources	Duration 1 Day
<b>Jay Price</b> Systems Specialist Human Resources	Duration 1 Day
<b>Jay Price</b> Systems Specialist Human Resources	Duration 1 Day

The 'Delegation' section shows 'No data to display'. A red box highlights the 'Approvals' tab and the 'My Approvals' table. A green box highlights the filter and menu icons above the table. A red box highlights the edit icon in the first row of the table.

2 Click on the symbol to the right of a leave request to view details and approve/reject it. This will bring up the Approve/Reject screen.

## Manager Guide to Approving Annual Leave in Aston Staff Portal

3

### To approve/reject a request

- Tick the box to say you have checked the leave request
- Set the status to approve/Reject.

**NB:** If you are rejecting a leave request you will be prompted to give a reason.

- **Wait a few seconds** for the request to process.

Once you have approved/rejected the request an email will go to your employee to notify them of the outcome and it will also display in their Portal.

On the approve/reject screen, you will see the full details of the request. You can also:

- Click on the people symbol to see if any of your other employees are on leave/not working on the requested date/s

**NB:** Start and end times in this screen show default working day.

- Click on the magnifier to view your employees current annual leave balance

**Approve/Reject**

Jay Price 10 May 2016 5:08 PM

Duration: .5 Day(s) Part Day: PM  
 Leave Type: Annual Leave Status: Unprocessed  
 Date From: 26 May 2016 Comments: test

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

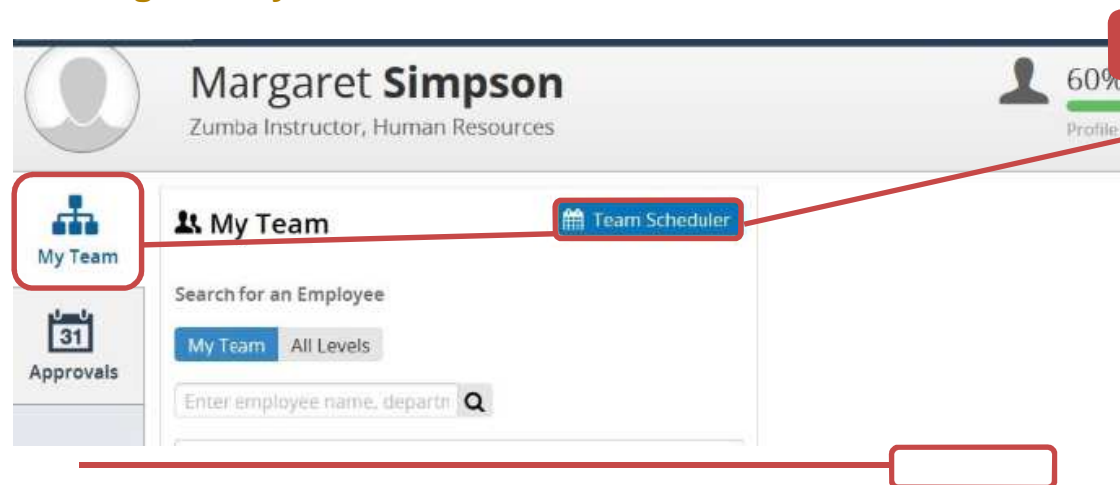
Name	Type	Taken	Current Balance	Amount Booked	Available Balance
Annual Leave (April)	Days	2	4.5	1	3.5

**View Team Absence** My Co workers leave/absence Powered By CORE

Person	Mon 9	Tue 10	Wed 11	Thu 12	Fri 13	Sat 14	Sun 15
<b>Sarah Purple</b> Personnel No: 1001186 Hr Administrator	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	ANNUAL LEAVE (Requested)	Resting 1381	Resting 1381
<b>Heather Brook</b>	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	Resting 1381	Resting 1381
<b>Heidi Brown</b>	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	Resting 1381	Resting 1381
<b>Philip Marsh</b>	Resting 1381	Resting 1381	09:00-12:30 1381	09:00-17:00 1381	09:00-17:00 1381	Resting 1381	Resting 1381
<b>James Pink</b>	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	09:00-17:00 1381	Resting 1381	Resting 1381

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## Viewing when your Team are on leave



1

You can view when your employees were / are due to be on leave.

From the Managers' Dashboard 'My Team' tab, click on the **Team Scheduler** button.

The screenshot shows the user profile for Margaret Simpson, Zumba Instructor, Human Resources. The 'My Team' tab is selected, and the 'Team Scheduler' button is highlighted. A search bar for employees is visible below the 'My Team' tab.



### Team Scheduler

Scheduler Balances

2

Use the navigation buttons to go backwards or forwards in time

Navigation: Previous, Next, Days, Months, Go To Date, Add New, Filter, Team Member

Team Member	Mon 16th	Tue 17th	Wed 18th	Thu 19th	Fri 20th	Sat 21st	Sun 22nd
<b>Denise Aldred</b> Payroll Officer Human Resources			AI				
<b>Heather Eden</b> Hr Advisor Human Resources							
<b>David Goodenough</b> Hr Systems Administrator Human Resources							

MS Excel Macros - An Introduction to VB

3

Hover over an absence to view more details.

# Manager Guide to Approving Annual Leave in Aston Staff Portal

## Viewing your Team's Balances

Home Dashboards HESA

Team Scheduler Scheduler Balances

Balances

Team Member

Team Member	Sick Leave Taken (Days)	Sick Leave Taken (Hours)	Annual Leave Remaining
Heather Brook Hr Administrator Information Services			48.7 HOURS
Heidi Brown Hr Administrator Information Services			2 DAYS
Philip Marsh Hr Administrator Human Resources			127.75 HOURS
James Pink Hr Administrator Human Resources			5.5 DAYS
Sarah Purple Hr Administrator Human Resources			3.5 DAYS

1

From the Team Scheduler, click on the **Balances** Button

2

You can see how many annual leave days / hours each of your employees have remaining.

NB: **Full time** employees annual leave will be displayed in days, **part time** employees annual leave will be displayed in hours. Any employees with **'irregular' working patterns** will display in hours.

3

**Double click** on an annual leave balance to view more details.

The top **Balances** section will give you an overview of the employee balances.

The bottom **Transactions** section will show you any adjustments to the balance, and the dates of any leave taken.

Common adjustments to annual leave balances will be 'part year adjustment' (your employee has started part way through the leave year) and 'FTE Adjustment' (where employees are part time).

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	

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## Cancelling leave on behalf of employees

Employees are unable to cancel leave in the past. If they booked a period of annual leave, but did not take it, you can cancel this on their behalf.

1

Go to the Team Scheduler from the Manager's dashboard.

Team Scheduler

Scheduler

Balances

The screenshot shows the 'Team Scheduler' interface. At the top, there are navigation buttons: 'Previous', 'Next', 'Days', 'Months', and 'Go To Date'. There are also buttons for '+ Add New' and 'Filter'. A search bar labeled 'Team Member' is on the right. Below the navigation is a calendar grid for the period '16th May 2016 to 22nd May 2016'. The grid has columns for 'Mon 16th', 'Tue 17th', 'Wed 18th', 'Thu 19th', 'Fri 20th', 'Sat 21st', and 'Sun 22nd'. On the left, a list of team members is shown: Denise Aldred (Payroll Officer, Human Resources), Heather Eden (Hr Advisor, Human Resources), and David Goodenough (Hr Systems Administrator, Human Resources). A grey bar representing an absence is highlighted for Denise Aldred on Tuesday, 17th May, with the label 'AI'. A tooltip for 'MS Excel Macros - An Introduction to VB' is visible over the Friday, 20th May cell.

2

Use the navigation buttons to find the previously entered absence for this employee. Double click on the absence to open it.

## Manager Guide to Approving Annual Leave in Aston Staff Portal

**Edit Absence Record**

**Absence Detail**

Employee: Heather Brook  
Start Date: 09/03/2015  
Part Day Leave:  Yes  No  
End Date: 09/03/2015

Leave Type: Annual Leave  
Appointment: Hr Administrator  
Open Ended:  Yes  No  
Or:

**Additional Information**

**Return to Work Interview**

**Medical Certificate**

**Balances**

Name	Appointment	Allowance	Requested	Booked	Remaining
Annual Leave (April)	502869-2	14.06		0.00	6.76

3

### To Edit

In the Edit Absence Record screen, amend the details and click Save.

3

### To Delete

In the Edit Absence Record screen, click the Delete button.