Welcome to Employee Dashboard

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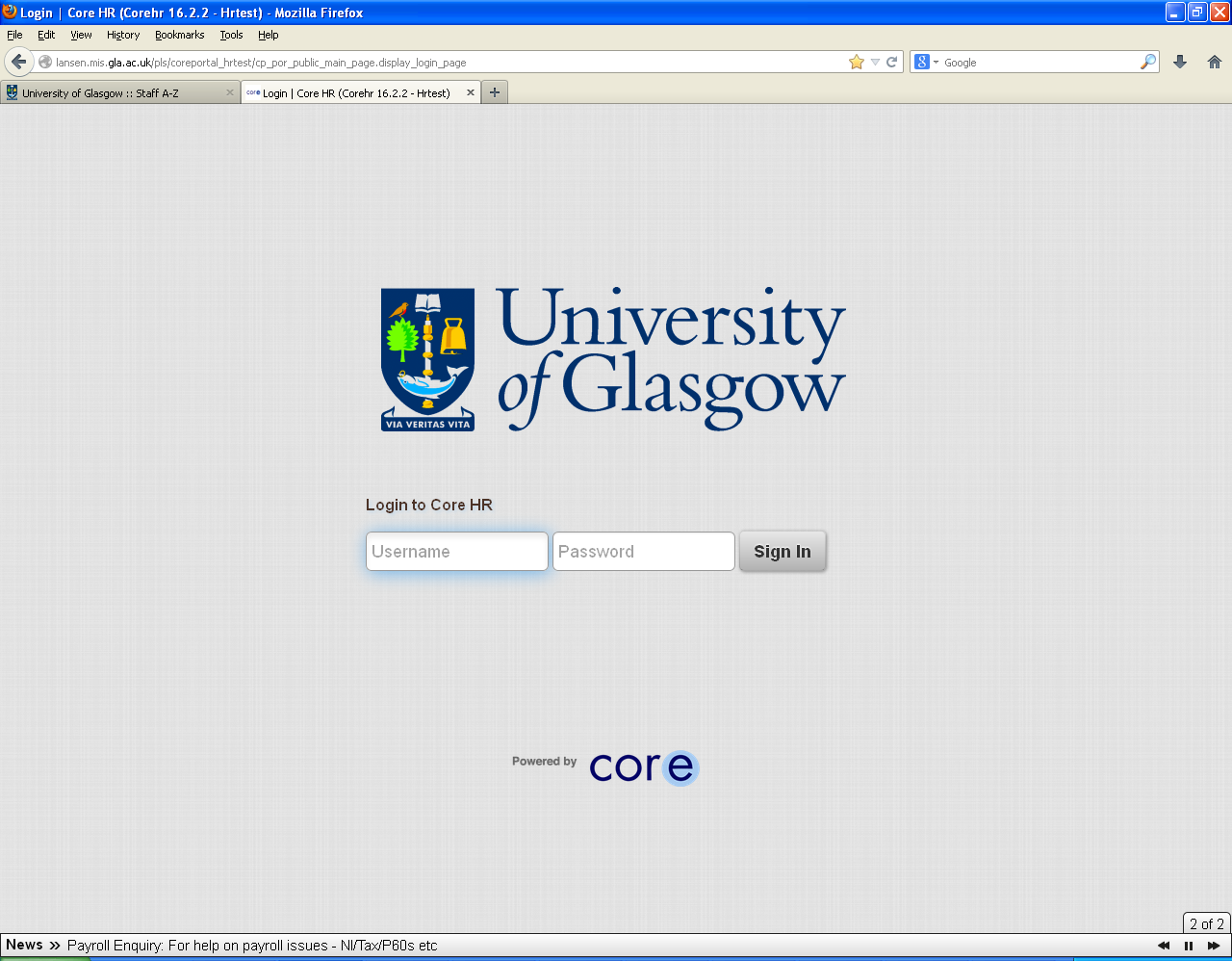
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# Login

Navigate to the **CorePortal login page** using the link below:  
<https://hrportal.mis.gla.ac.uk/pls/coreportal_live/cp_por_public_main_page.display_login_page> 

Enter your **GUID** in the username field > enter your **password** in the password field > press **enter** or select **Sign In**:



## Employee View

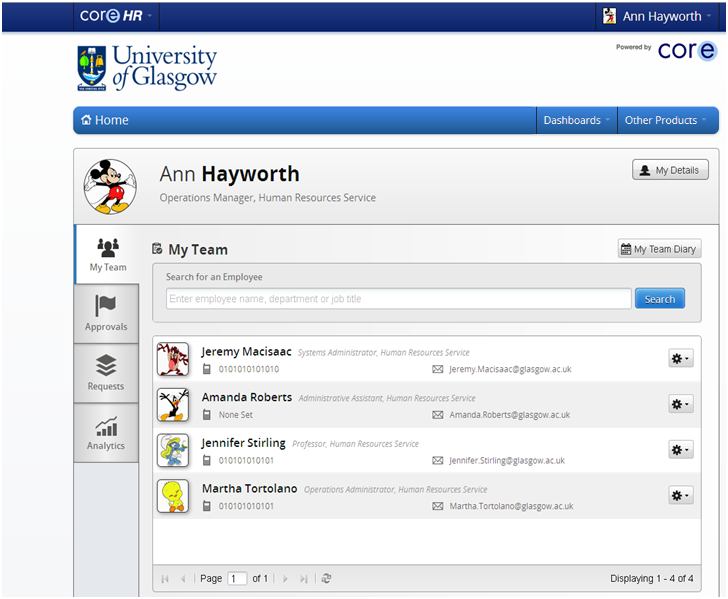
Your home / profile page will appear detailing basic information.

Clicking home button will return you to this view

## 

## Line Manager View

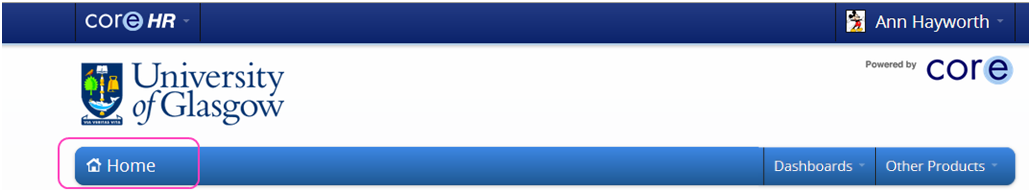
If you are a line manager you will see your team when you log in



To navigate to Employee Dashboard click on CoreHR icon and choose Employee Dashboard.



To return to Manager Dashboard repeat or Click on Home button



# Navigation icons

Some of the useful navigation features in CorePortal include the following:

The **Tools icon**  is available on different parts of CorePortal and selecting this will often give you relevant options for the section you are editing or updating.

The **Filter icon**  is also available on many screens and will allow you to filter the results of what you are looking at, such as leave request type.

The **View icon**opens up a window to allow you to view details and sometimes to edit those details further along with other options.

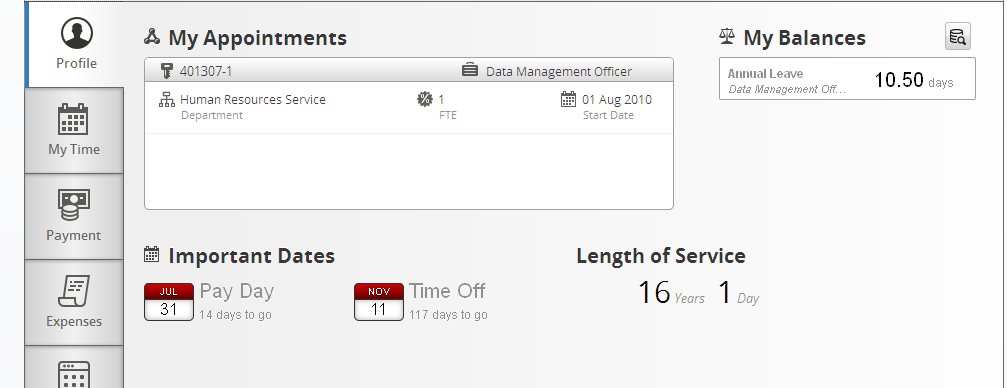
The **Calendar icon**  and  provides a calendar view for you to choose dates when selected:  
 

The **Select Appointment icon** allows you to select a different post/appointment if you have more than one job:  


# Employee Home Page – overview

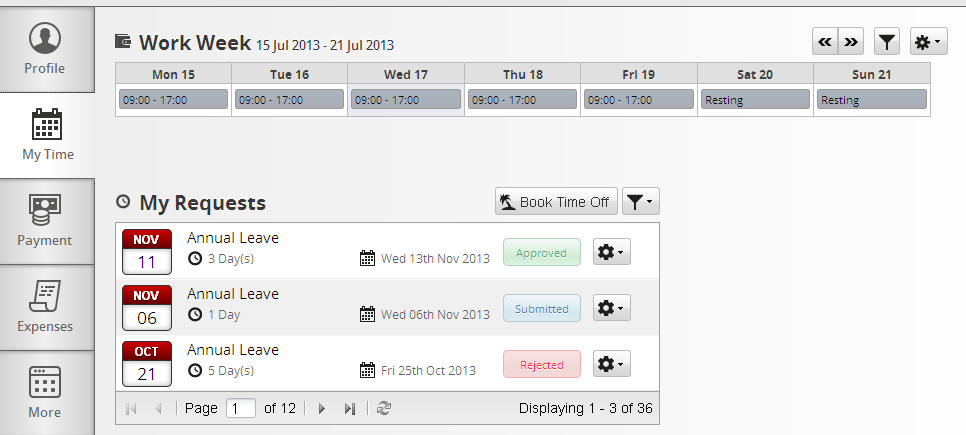
## Profile

Displays summary of your appointment details; balances and important dates – Payment date; next holiday date; length of continuous service



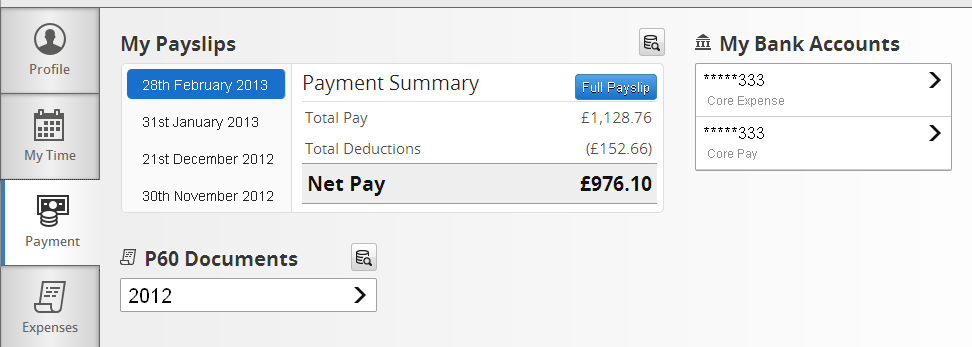
## My Time

Summary of work patters and any requests made – can be accessed via **My Details** also



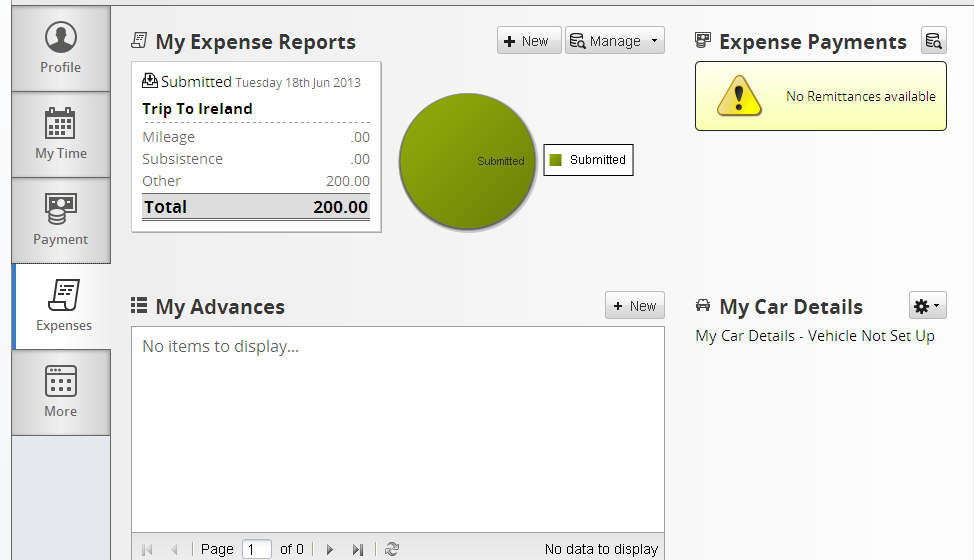
## Payment

Displays pay slip details; P60 details; Bank details. Again some of these can be accessed via **My Details** also



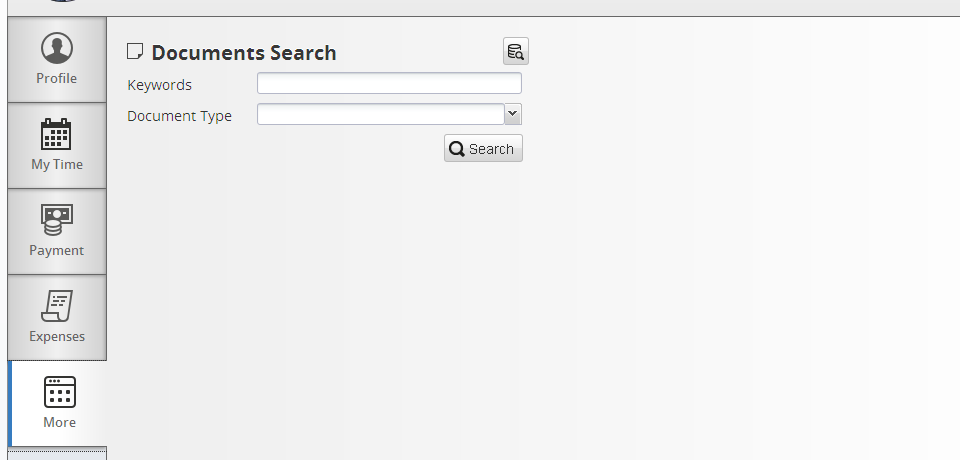
## Expenses

This is where you are able to submit expenses claims and view all details relating to these. Information on how to complete is available via the Documents view on **My Details**  or **More** tab



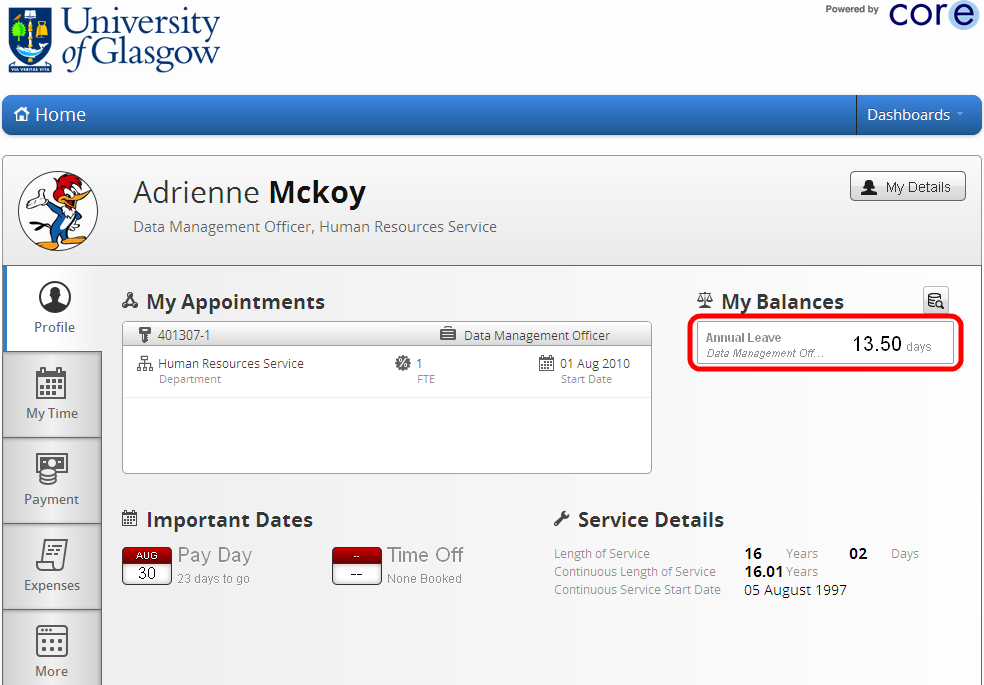
## More

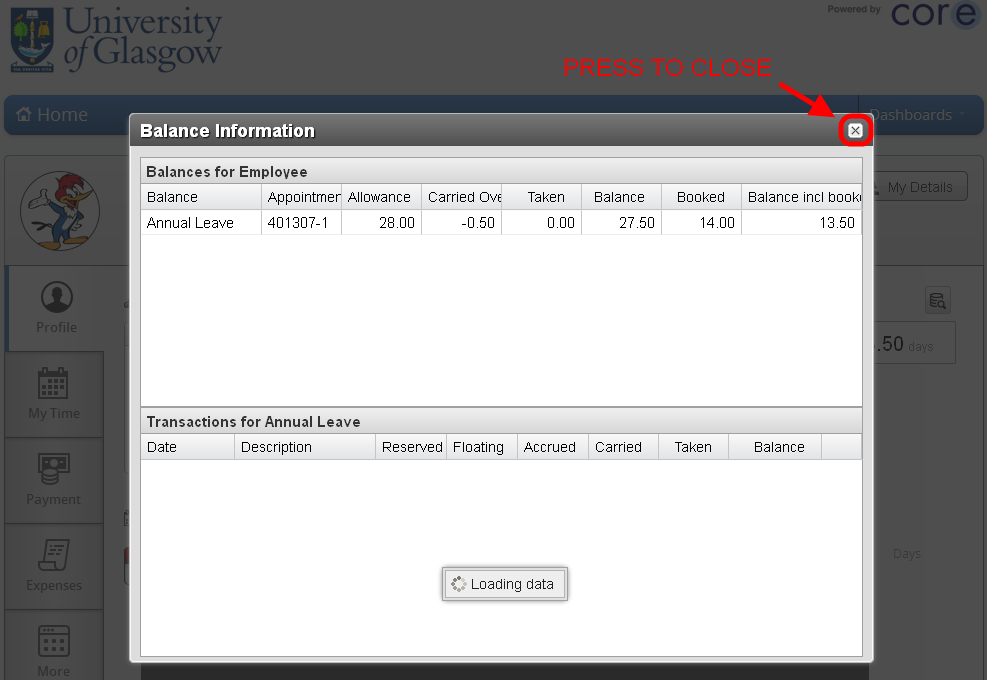
At present this allows you to view any documents relevant to you. Future development may add further functionality to this screen



# View Holiday Balances – quick view

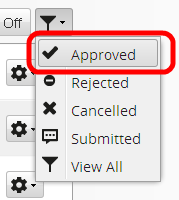
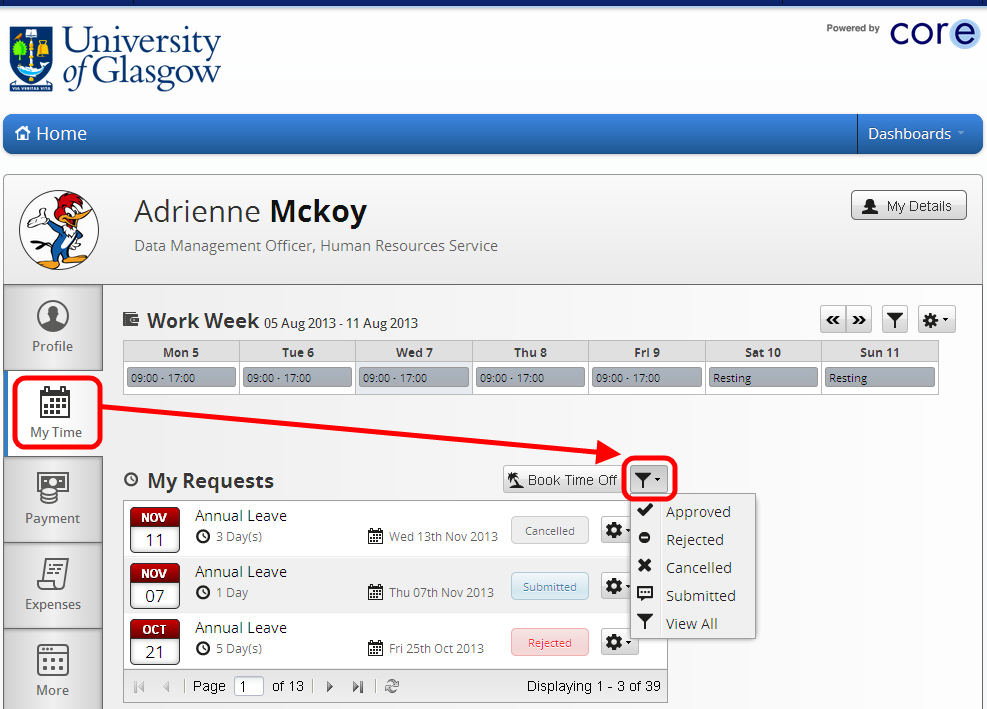
Click on My Balances box to view detail behind balance.



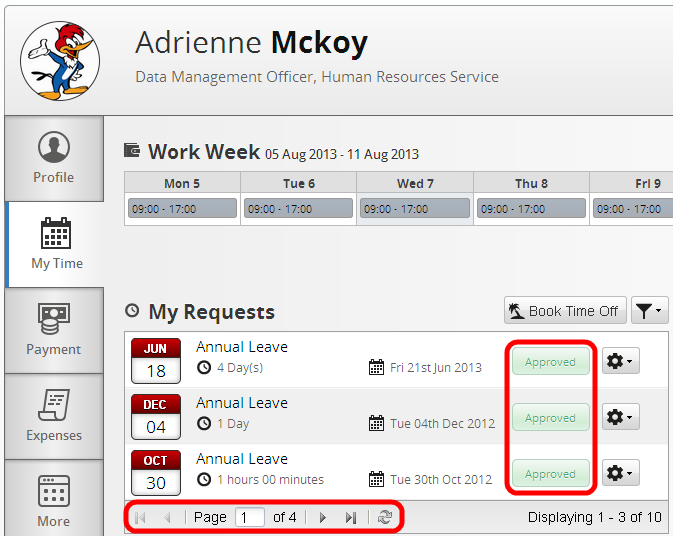
Here you can view your **Annual Leave Balance Information**:  


Press the **X** at the top right to **close** the window.

# Submit Leave Request

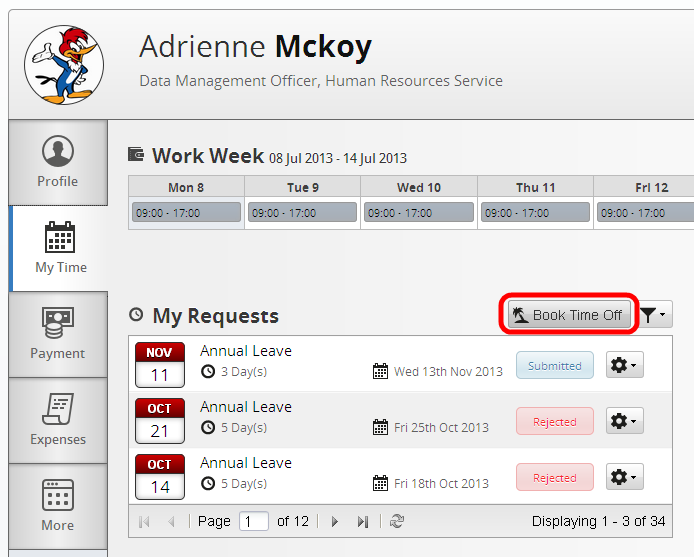
My Time navigation  **Select** the **My Time** tab on the left of the screen:  


Here you can view more detailed information on your Time and Attendance. **Select** the **filter** as shown above to filter your leave request type > choose **Approved**.

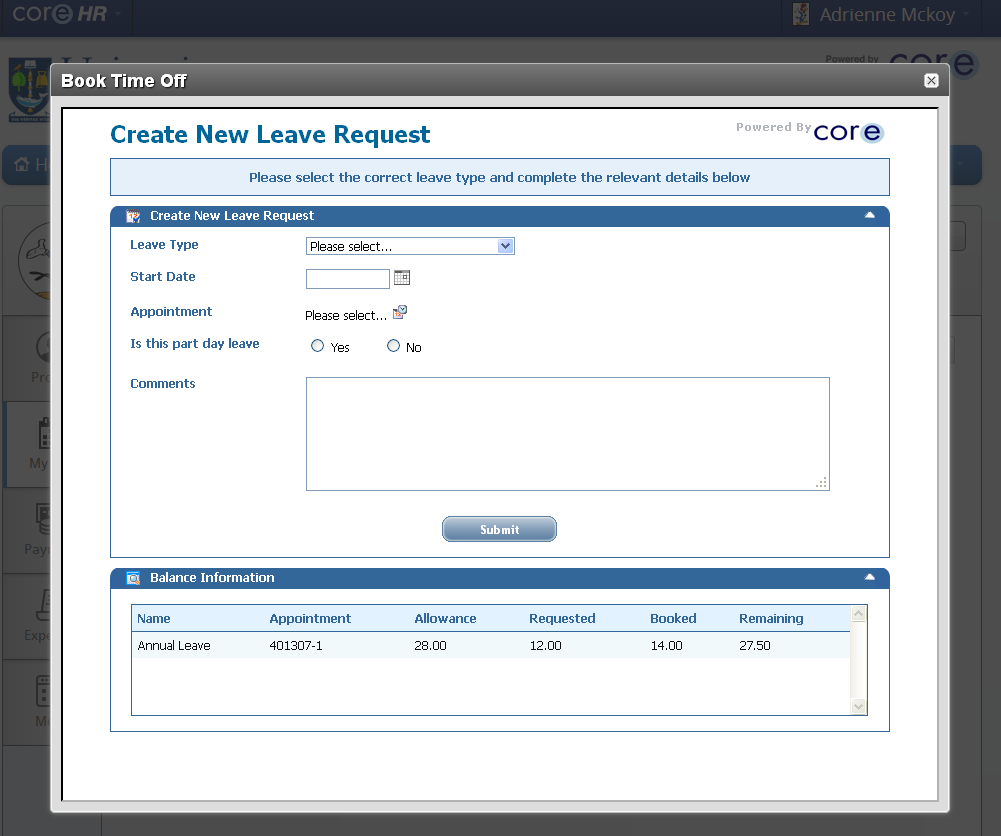
This will show only your approved leave requests over several pages which you can navigate between using the page options highlighted below:  


**Select** either **Cancelled / Rejected / Submitted / View All** to filter your Leave Requests accordingly.

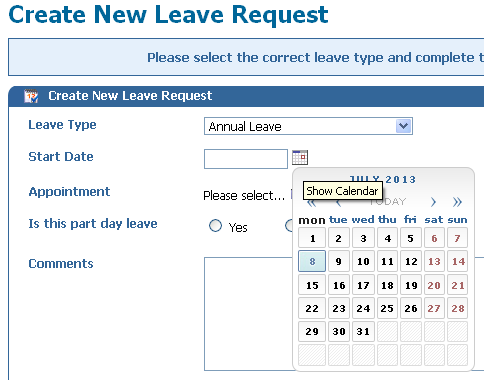
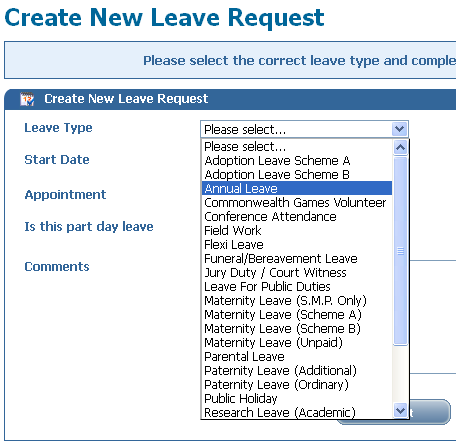
### Book Time Off

In the My Time tab select the Book Time Off button**:**

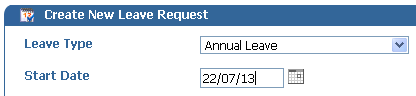
This will open up a new window where you can enter the details of the leave request you wish to submit:

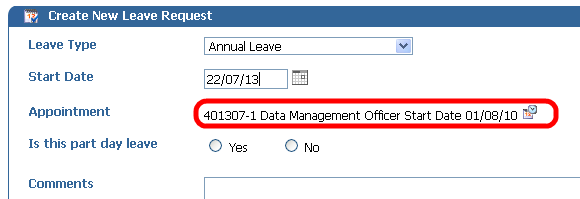


**Select Annual Leave** > select the **calendar icon** to choose the day you wish to request:

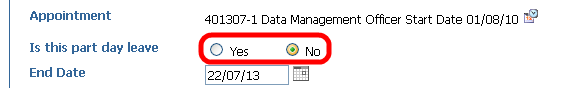


Alternatively, you can type in the date in the following format:

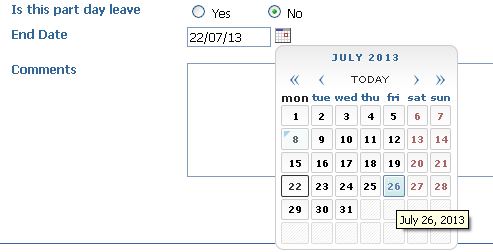


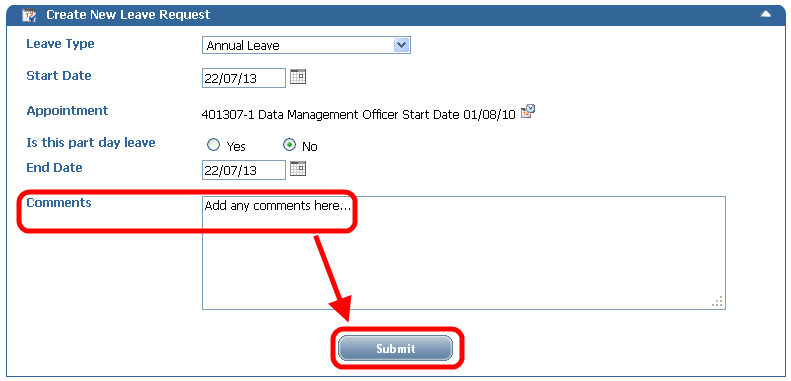
**Select** your **Appointment ID** if you have more than one post by pressing the **icon** on the right hand side:  


**Select** the **Yes** or **No** button to indicate if this is a half day leave request or not. If you select No the system will enter a default and date for a 1 day request:

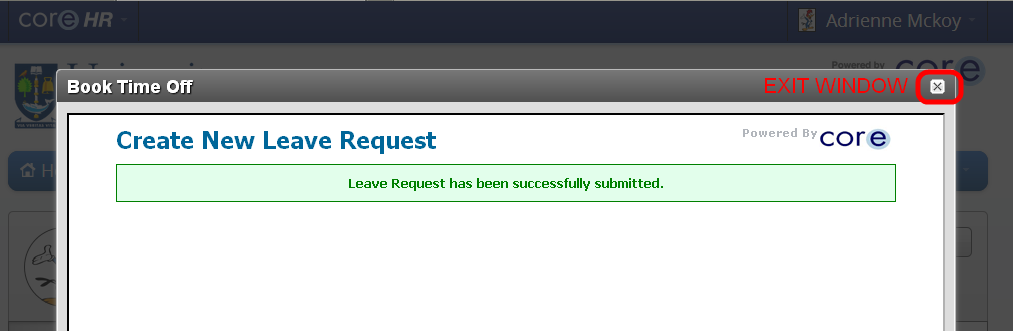


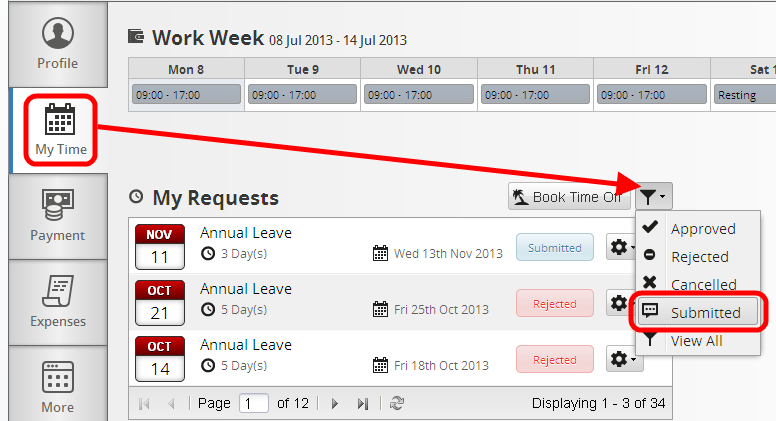
Use the **calendar icon** again to **select** a different **end date** if the request is for more than one day. You can also type this in the format shown above.



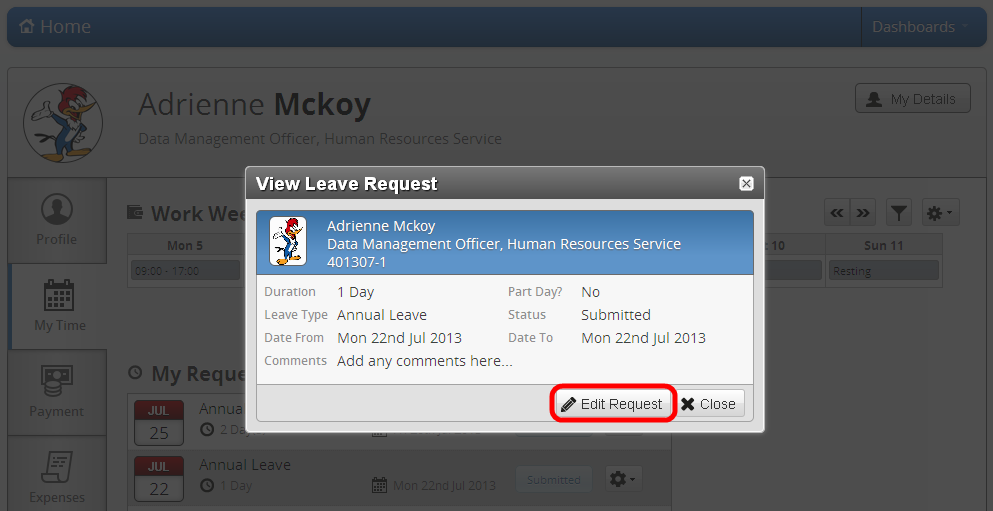
**Add** any relevant **comments** for your Line Manager > **select** the **Submit** button to submit your Annual Leave Request:  


Once submitted you will see a **confirmation message** > **select** the **X** at the top right to **close** this window:

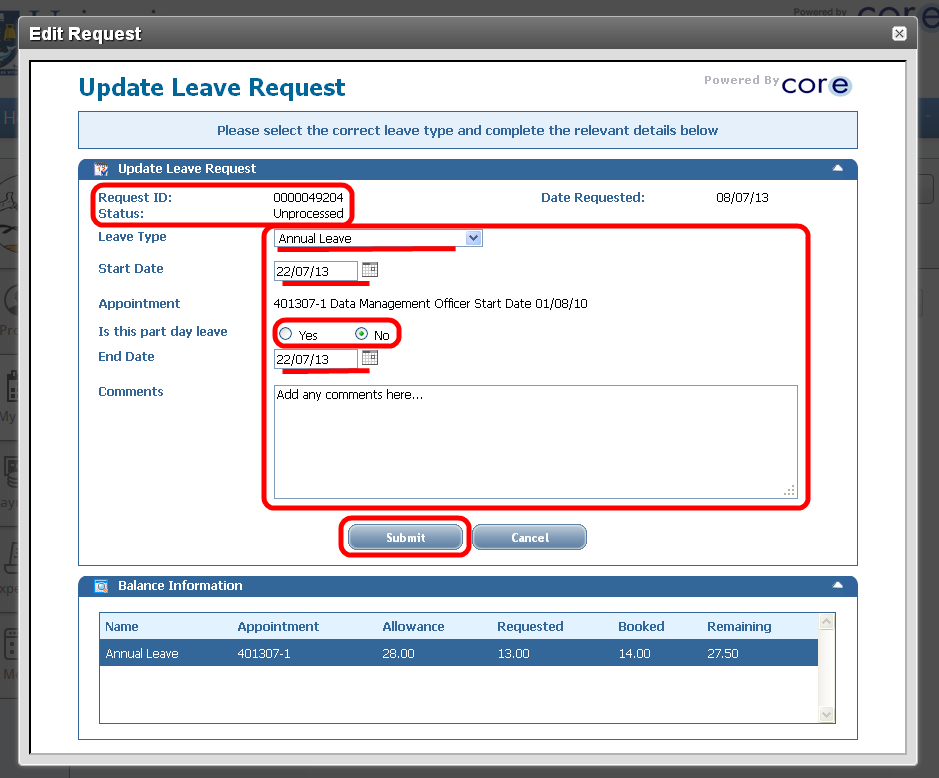


On the **My Time** page **select** the **filter** to display your **submitted** leave requests:  


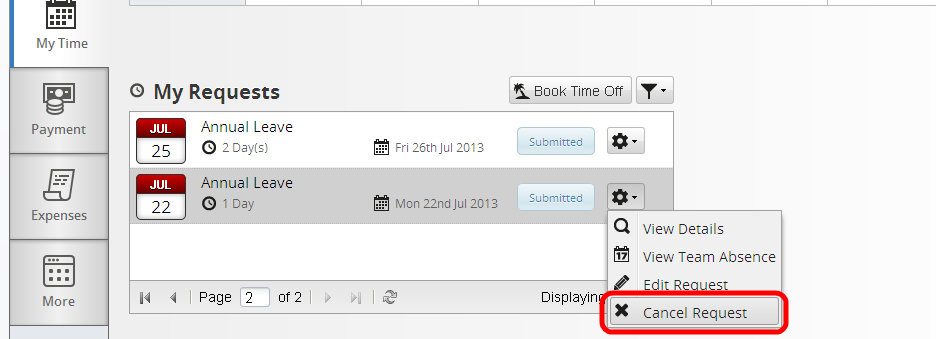
**Navigate** to the request you have just submitted > **select** the tools icon to **View Details**:  


Edit Request This will display the details of the submitted leave request > select Edit Request:  


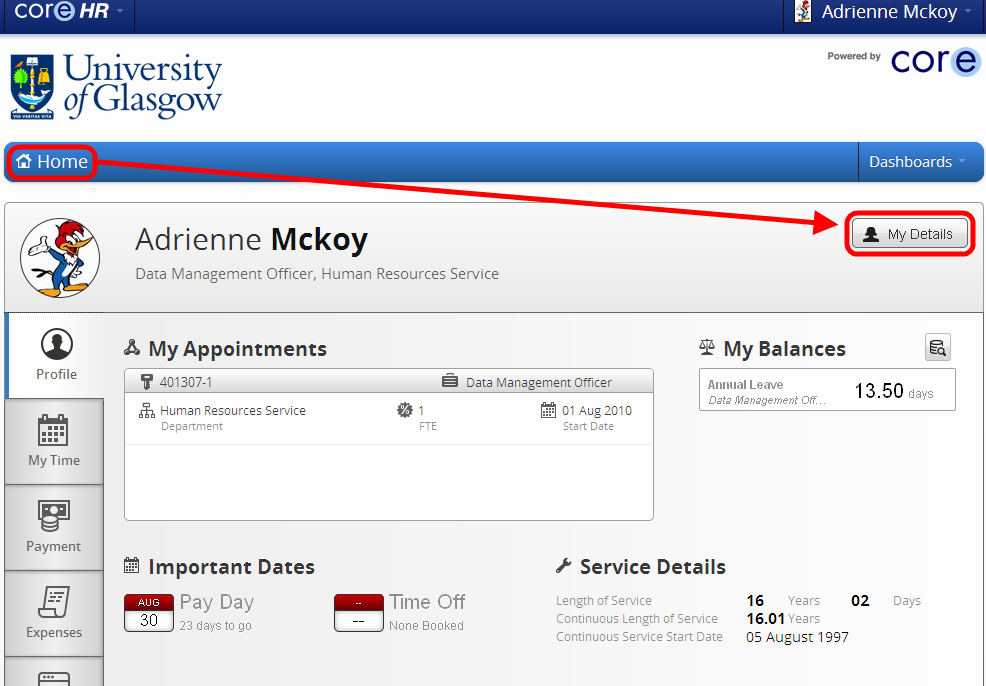
(You can also **close this window** by **selecting the Close Button** or the **X** at the top right)

The Edit Request – *Update Leave Request* window will display, you can edit any of the highlighted fields and submit the request with your changes:  


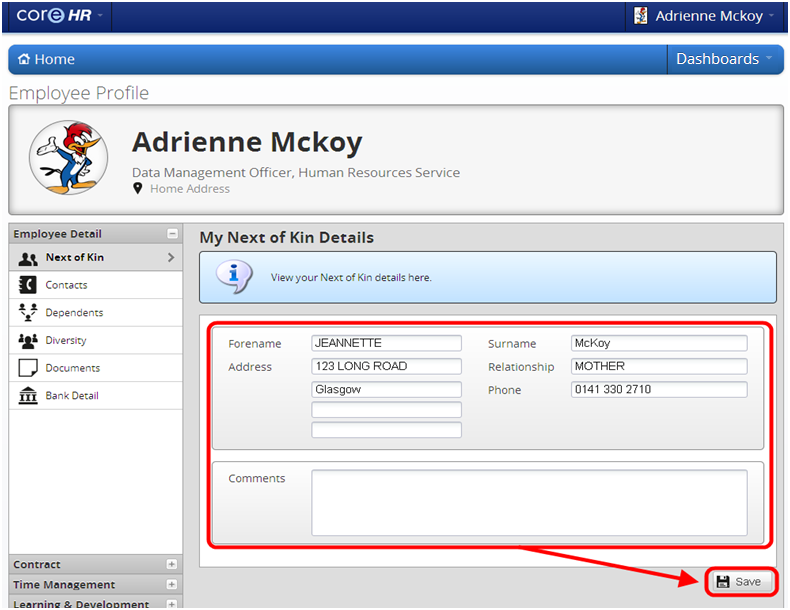
You can also select the option to **Edit** or **Cancel** Request by selecting the tools icon on the right:



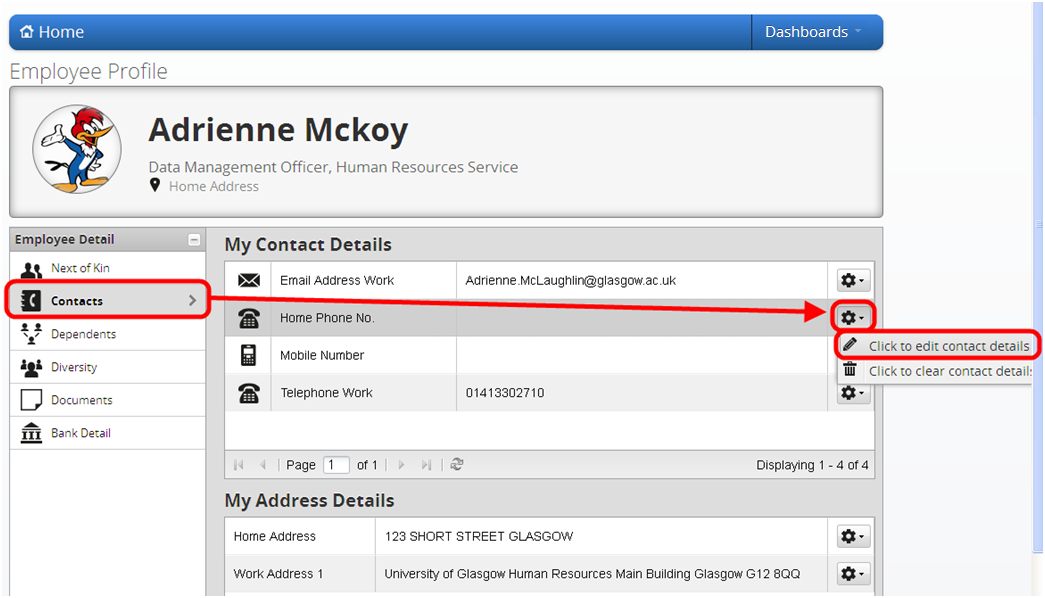
# Update Personal Details – My Details button

**Select** the **Home** button to return to the Profile page > **select** the **My Details** button:  


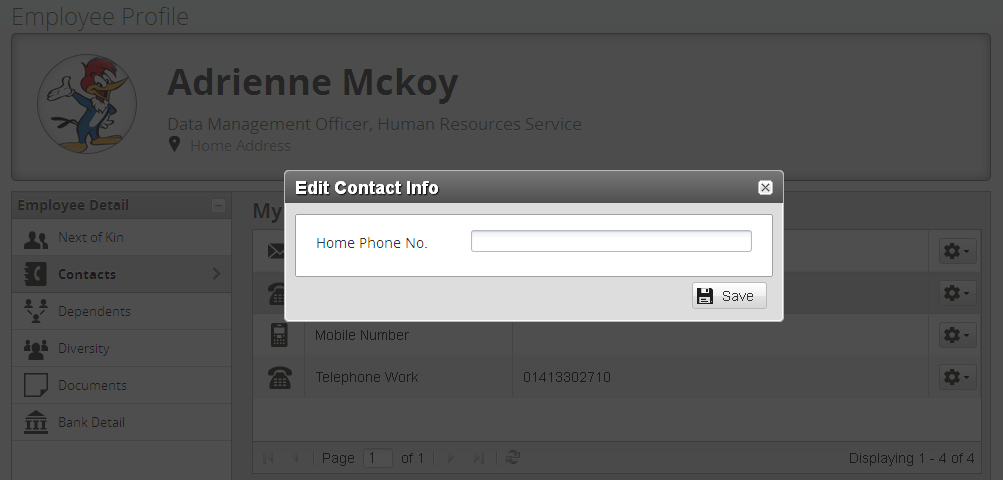
## Next of Kin details

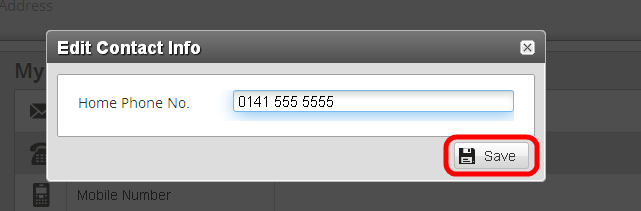
This will take you to the **Employee Profile** screen > **My Next of Kin Details**. **Update** any of the details below then **press** the **Save** button:  


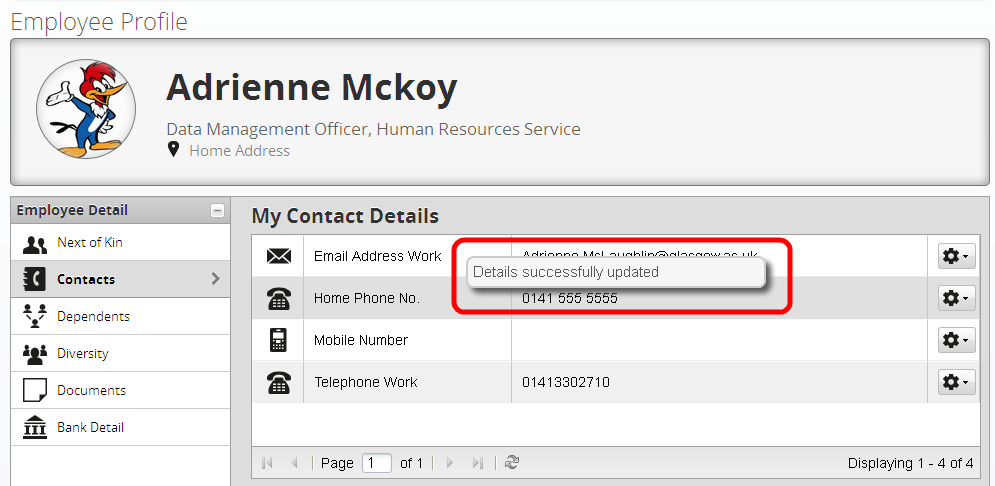
## Contact Details

**Select** the **Contacts** from the **Employee Detail** options > **select** the **tools icon** > **click to edit contact details**:  


(You can also **select** the **click to clear contact details** option to blank out the contact detail you have selected.)

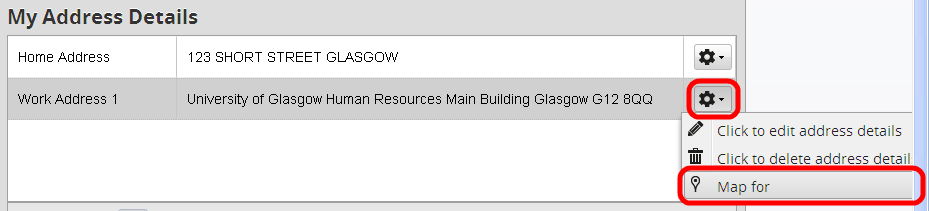
On the following screen we can add in a Home Phone No. to this record:  


**Enter** a **Home Phone No.** then **press** the **Save** button:  


You will then return to the Contacts page and see a confirmation message “**Details successfully updated**”:  


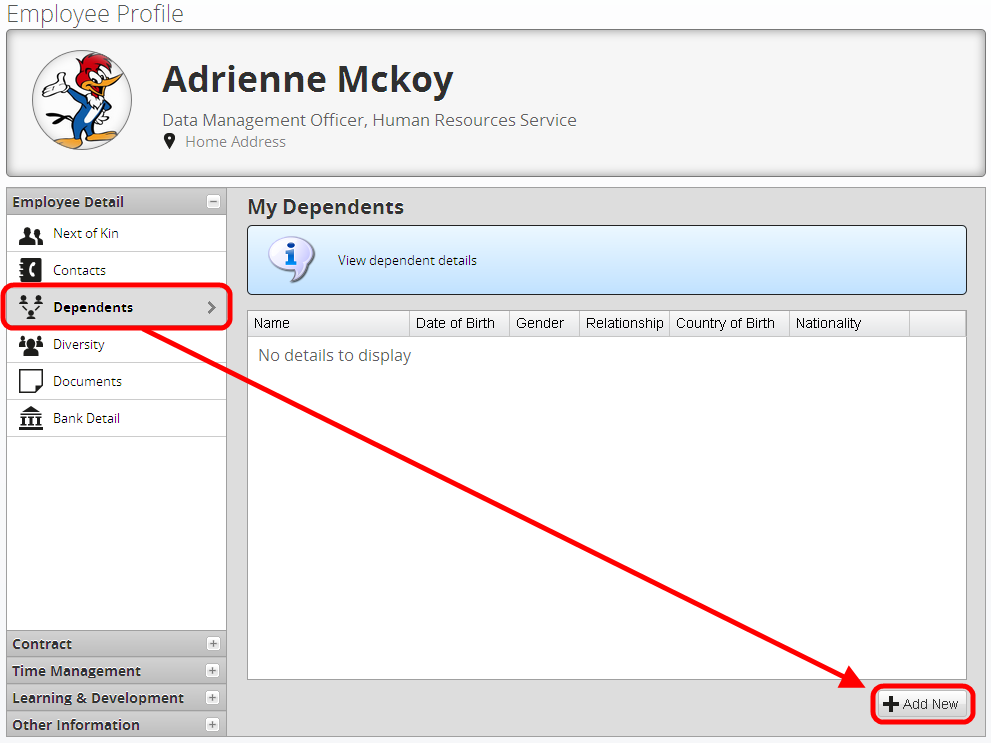
## Address Details

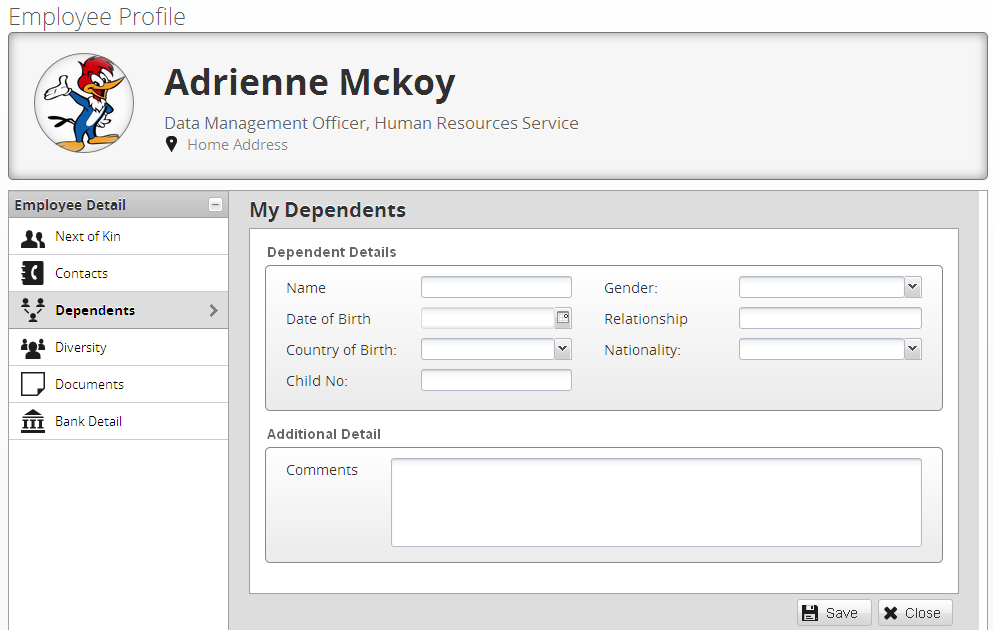
My Address Details shows the same options as the Contact Details with the addition of a Map > **select Tools** > **Map for**:



## Dependants Details

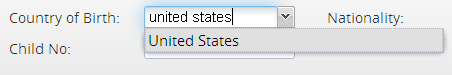
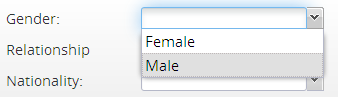
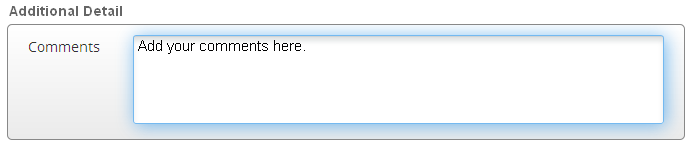
On the **Employee Detail** section > select **Dependants** (the record below has no details to display) > then **select** the **Add New** button:



The following screen will display:  


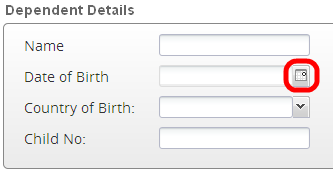
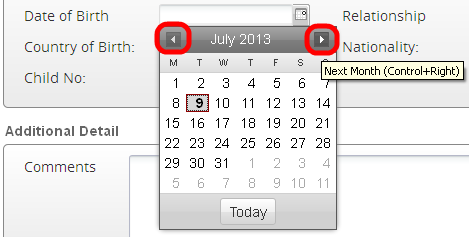
Add in all relevant details in the fields above; Name; Gender; Date of Birth; Relationship; Country; etc.

The **Name**, **Relationship**, **Child No.** and **Comments** fields are all free text. The **Gender**, **Country of Birth** and **Nationality** fields are drop down lists. On these you can type the beginning of the word and it will auto populate the available choices, see the examples below:

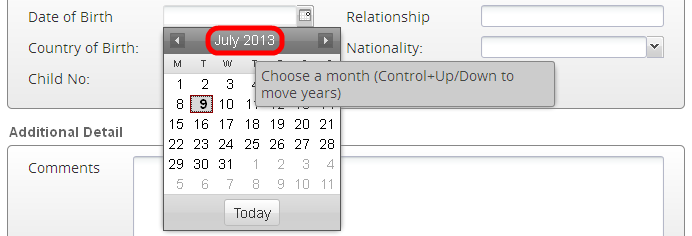
The **Date of Birth** field is a **calendar** you can select from by navigating to the correct date.

**Select** the **Calendar icon** to open the calendar pop-up display > you can use the **arrows** to change to the **Next Month**:

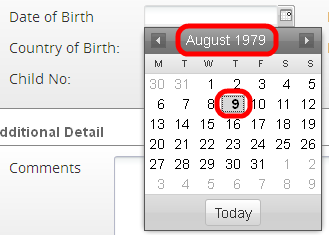
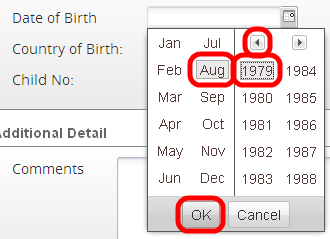
 

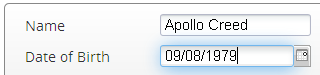
If you need to select an older date such as 09/08/1979 then you can do the following:

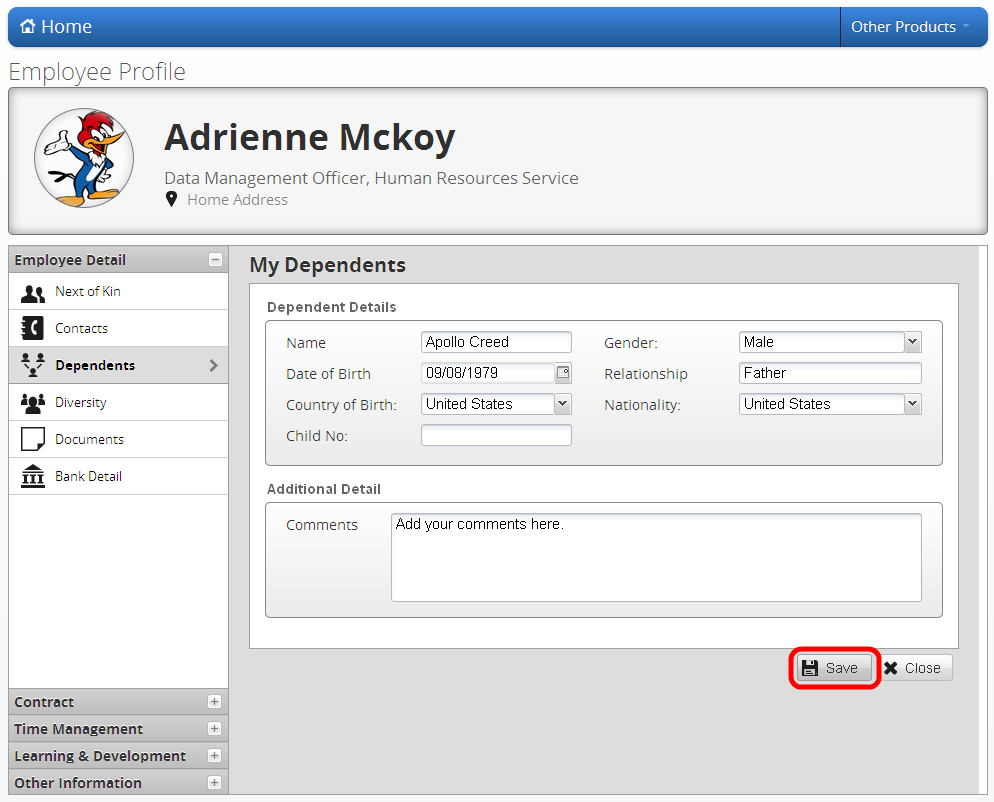
**Select** the **date** as indicated below:

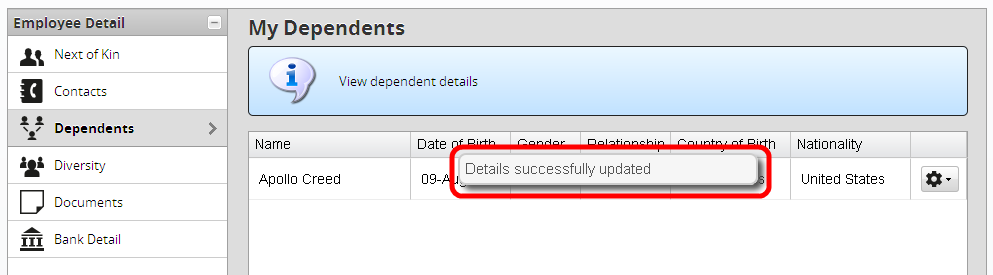


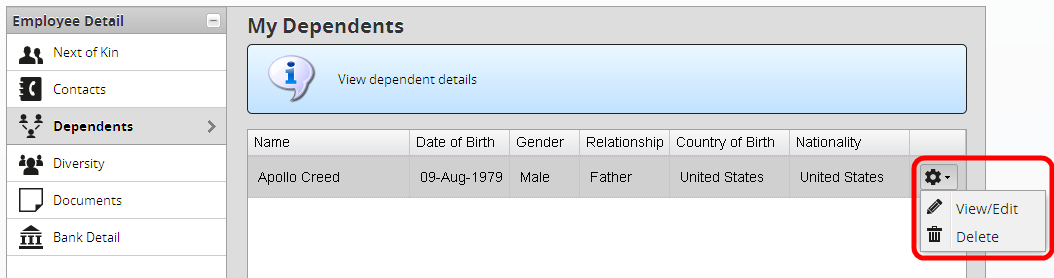
This will display two fields, one with the months and the other with the years > **select** the **month / year** you require using the mouse > **press ok** > then **select** the correct **date** and this will close the calendar:



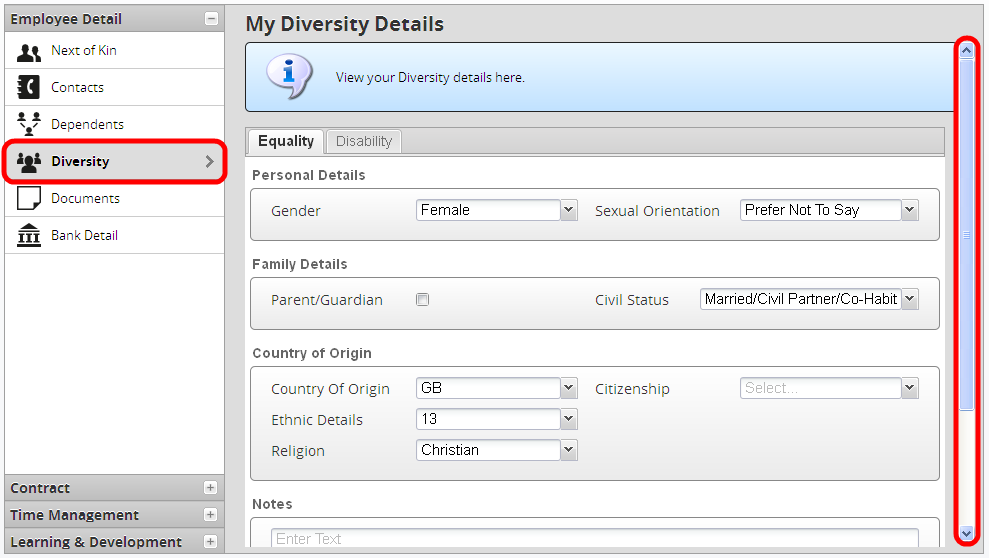
Once you have **selected** the **day/date** on the calendar the **date will populate** in the **Date of Birth field**:  


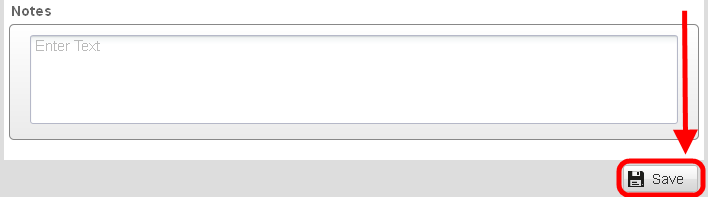
All of the fields should now be complete > **press** the **Save** button:

You will then see the following message:  


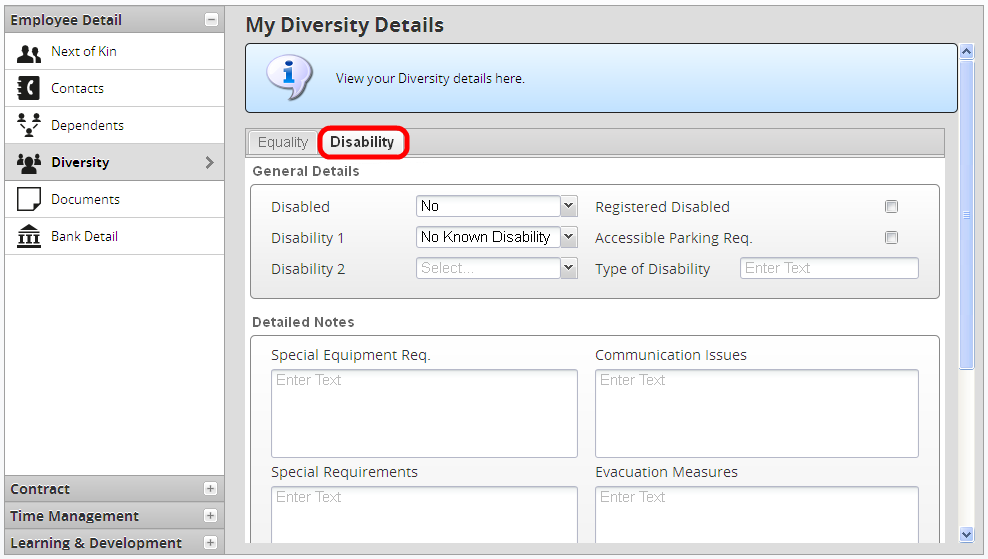
Now you are able to View/Edit or Delete this entry > **select** the **tools icon** and either **View/Edit** or **Delete**:  


## Diversity Details

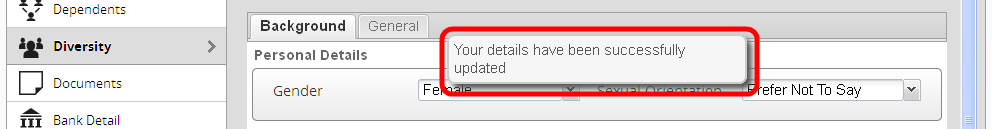
On the **Employee Detail** section > select **Diversity** > then **update** any relevant details from the fields shown below:  


The **Save** button is at the bottom of the screen if you scroll down: 

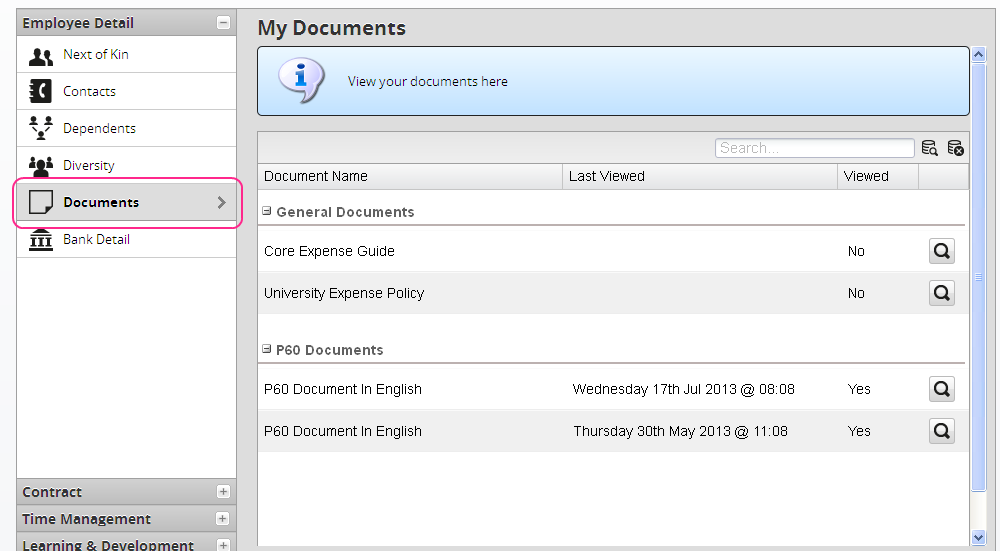
Select the **General** tab to show the following **Disability** fields:



The following **confirmation message** will then display to confirm that **Your details have been successfully updated**:

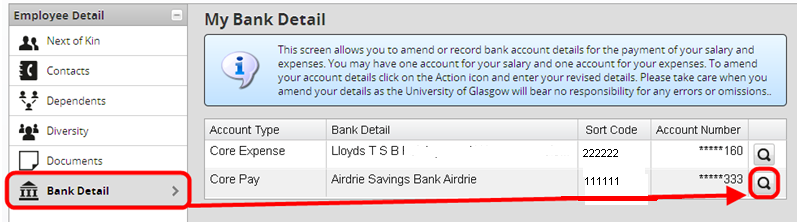


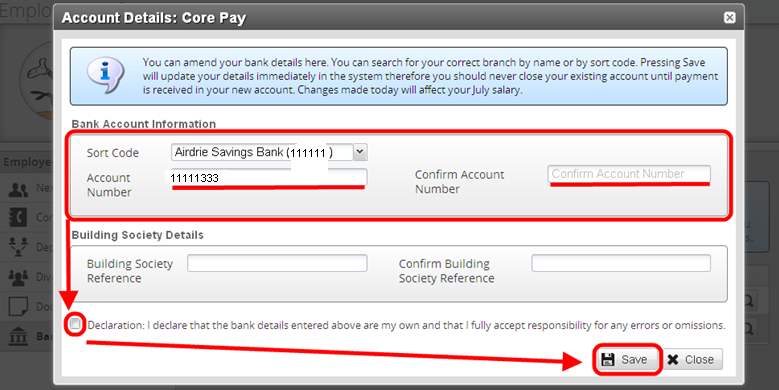
## Documents

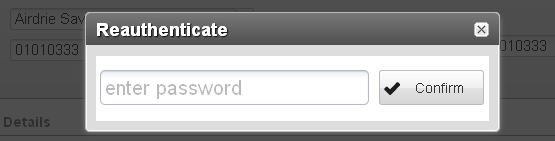
Your P60s will appear. Also any links to any relevant documents for help with CoreHR

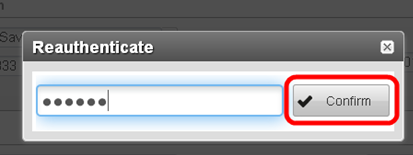
## Bank Details

On the **Employee Detail** section > select **Bank Detail** to view the My Bank Detail screen below > **select** the **view icon**:

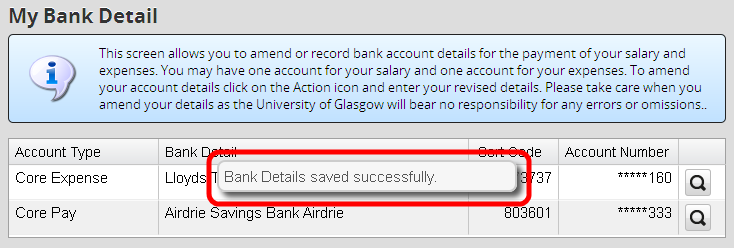


The **Account Details: Core Pay** window will display > **update** the relevant fields including the **Sort Code** and **Account Number** twice> **check** the **Declaration** then **press Save**:  


After pressing save the following **password confirmation** will display > **enter** your **CorePortal password** > **press** the **Confirm** button:  


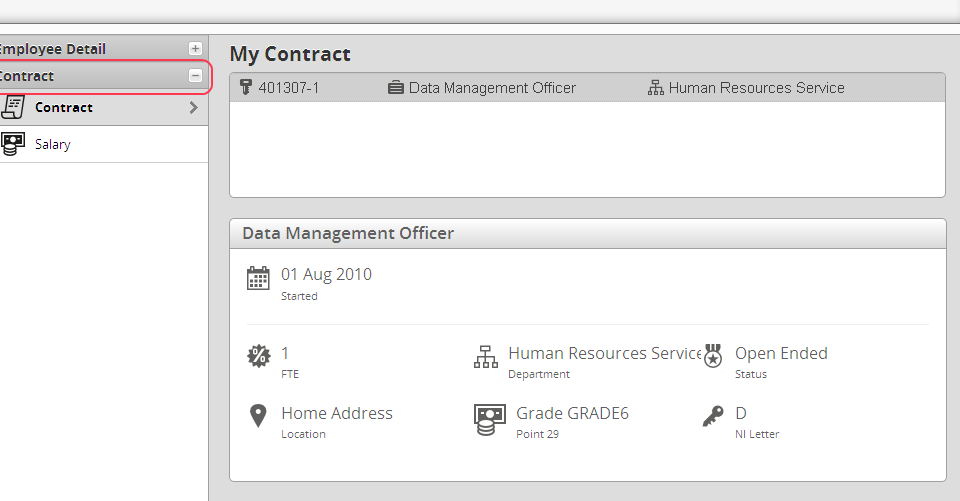


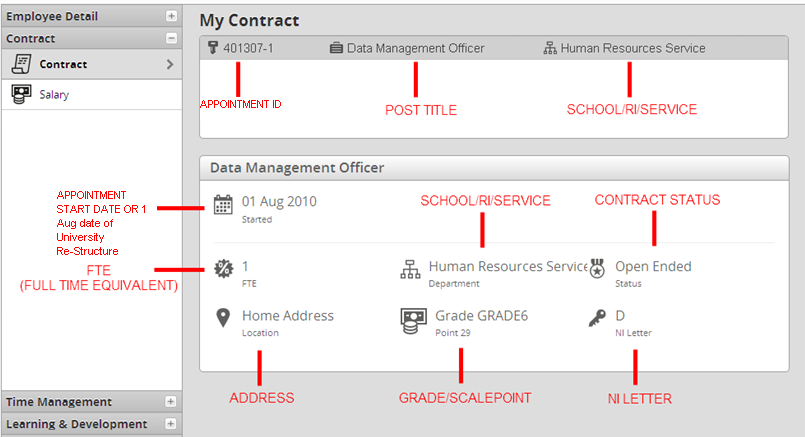
A **confirmation message** will display to confirm that your **Bank Details saved successfully**:

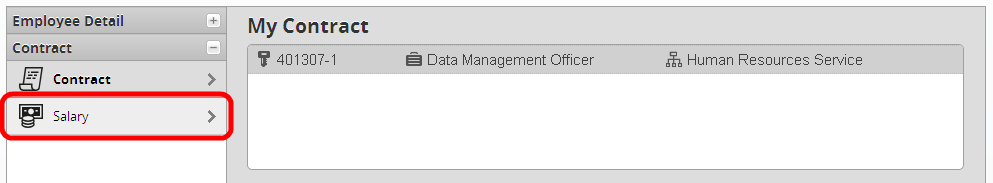


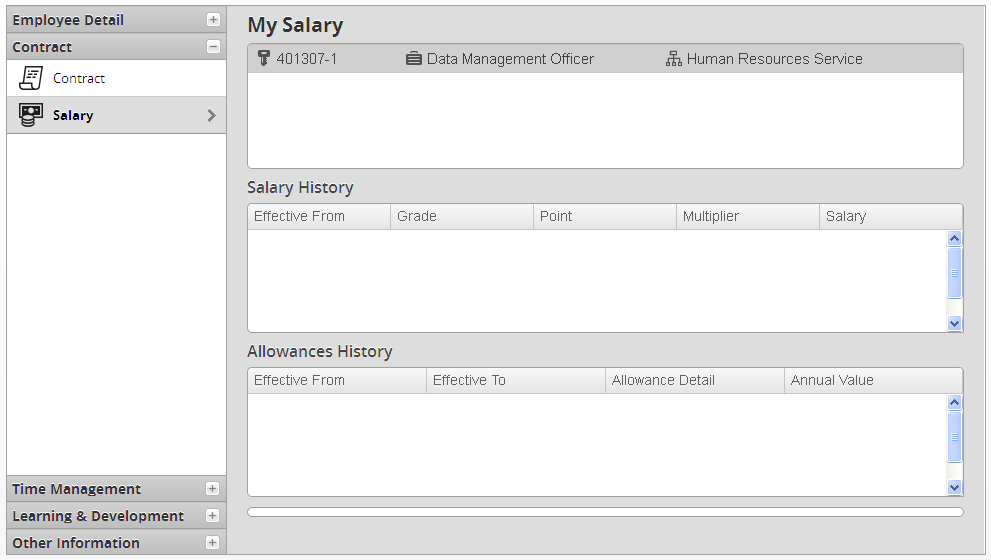
# Contract Details

To view your contract details > **select** the **Contract** box from the **Employee Detail menu**

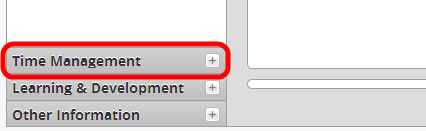
****

Below are descriptions of what each item is referring to:  


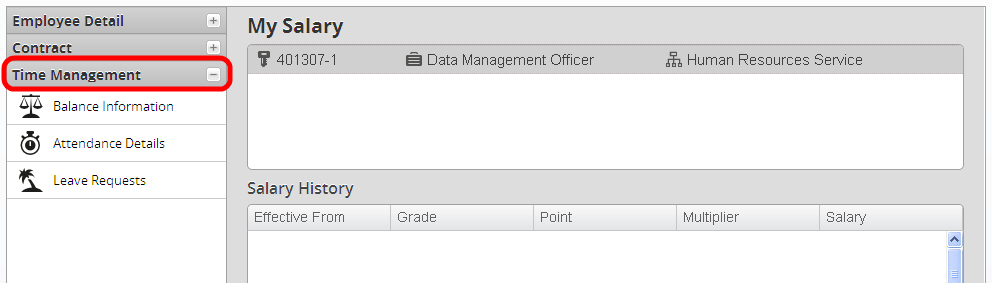
Now **select** the **Salary** option from the **Contract menu**:  


The following screen will display showing details of your salary in future release:  


# My Time

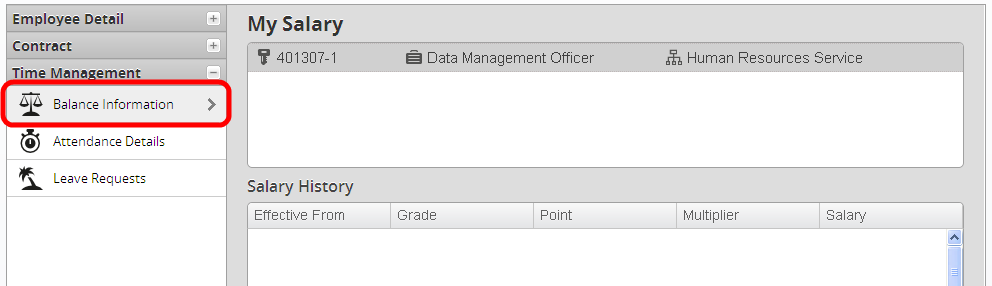
Now **select** the **Time Management** option from the **Employee Detail** Menu:  


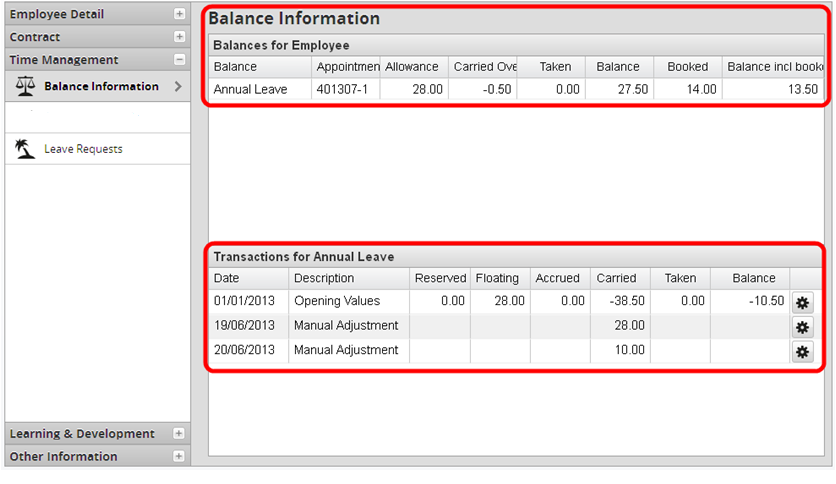
The previous screen will display and you will see the following sub-menu options:



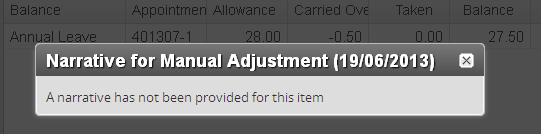
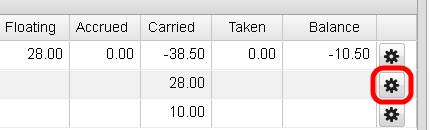
## Balance Information

**Select** the **Balance Information** option from the menu:

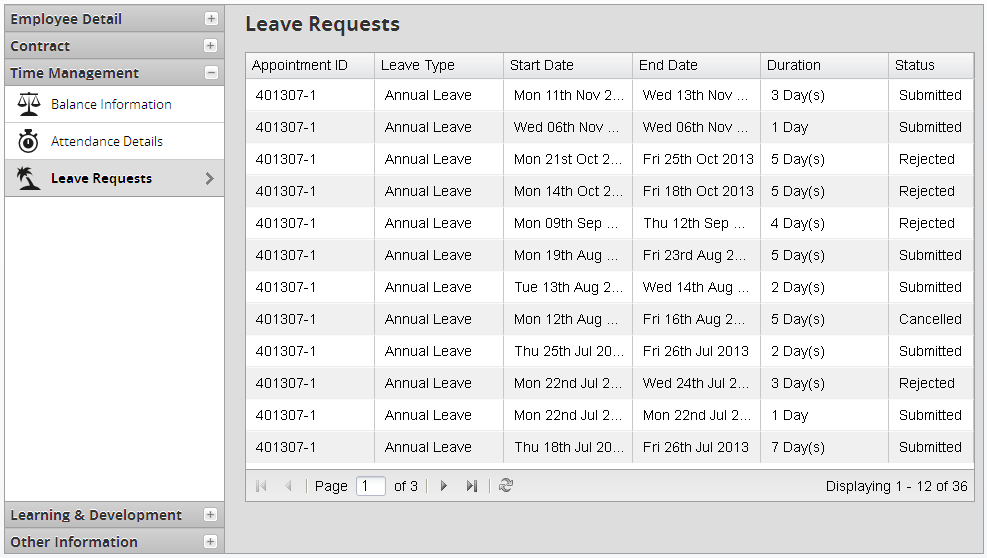


The following screen will display showing information on your annual leave balance including any balance adjustments:  


**Note:** Some of the manual adjustments that display here will include any adjustments done for staff members who have worked on a Public Holiday or Other Day.

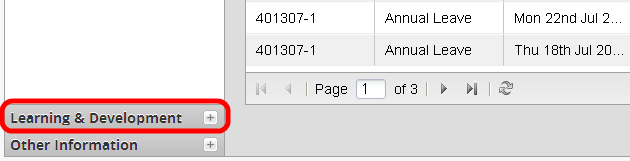
You can also **select** the **Tools icon** to **view** any **narrative** attached to the balance adjustment, if there is one:  


## Leave Requests

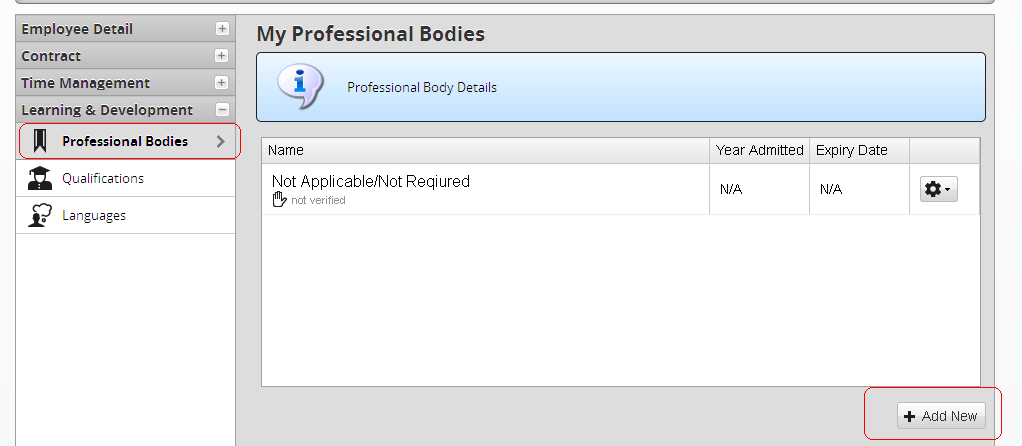
Now **select** the **Leave Requests** option from the **Time Management** menu:  
Here you will see a history of your leave requests including those that have been submitted, rejected or cancelled:  


# Learning & Development

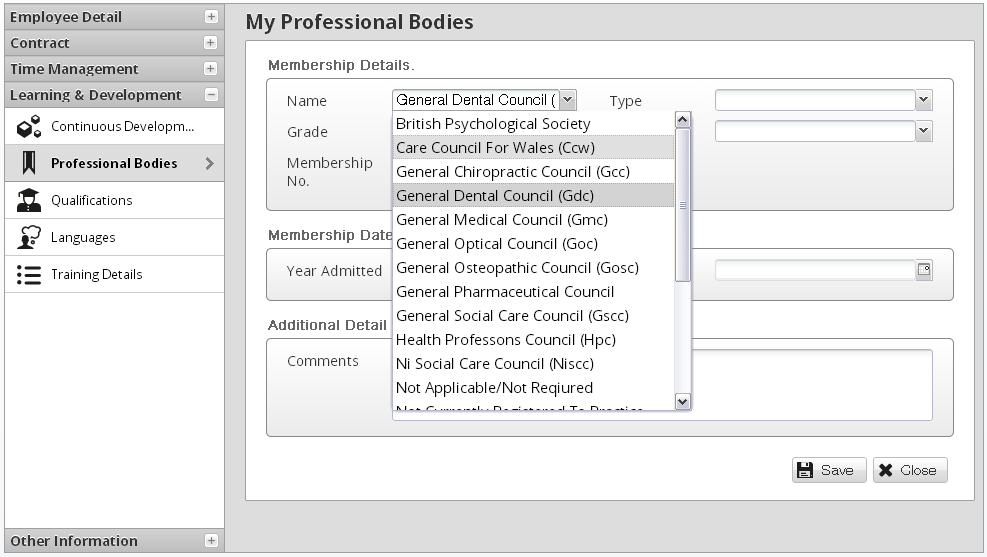
At present the options available to complete are Professional Bodies; Qualifications; Languages.

Select the Learning & Development section of the Employee Detail menu:  


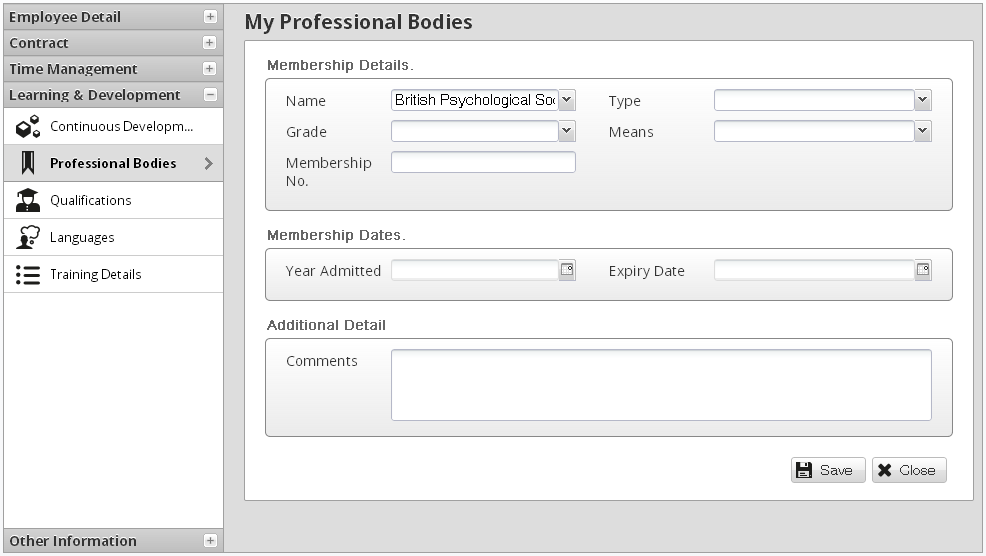
### Professional Bodies

**Select** the **Professional Bodies** option from the Learning & Development menu > **select** the **Add New** button so we can add to this screen:

Select the relevant **Professional Body** from the drop down list

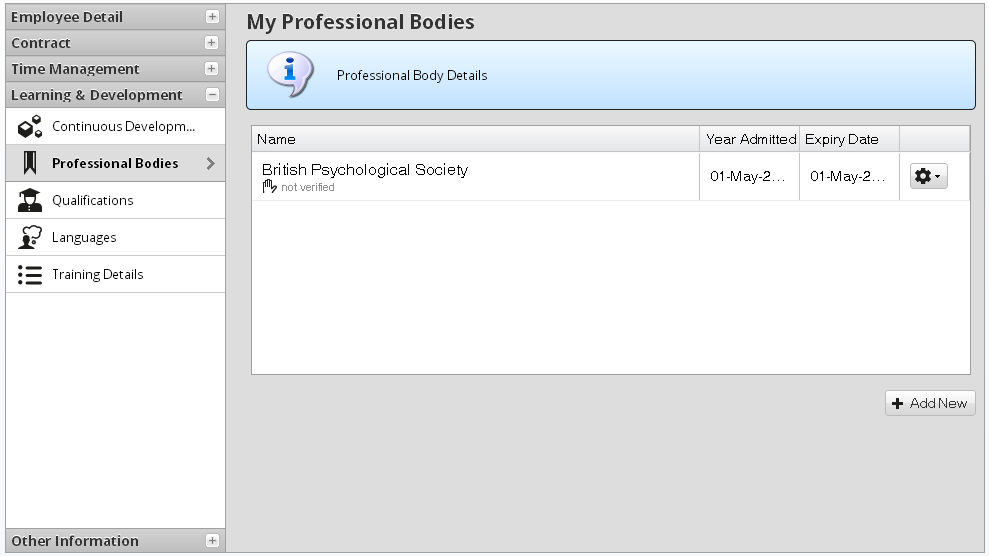


After the **Professional Body** has been selected, continue to fill in the rest of the information and click **Save**



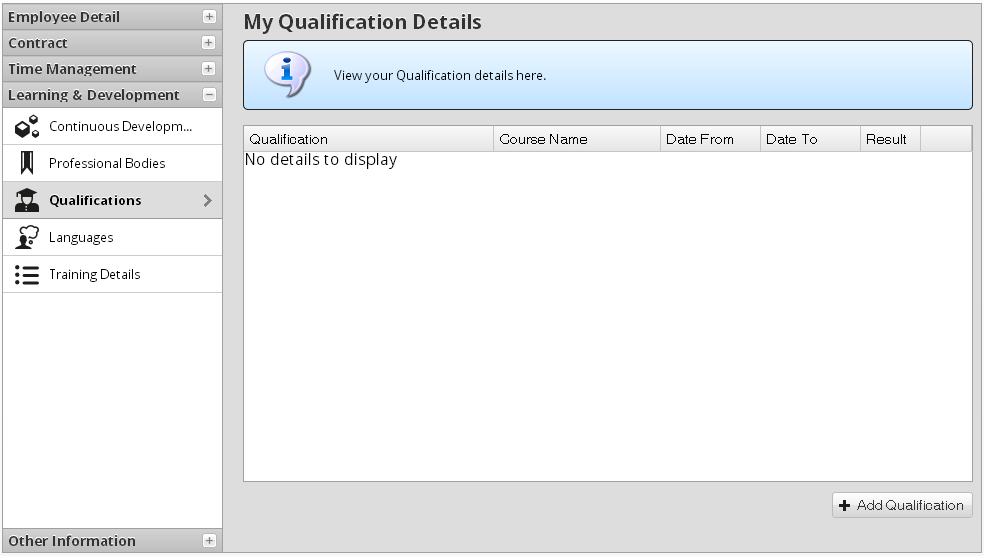
\*\*Reference data is missing

The page will now update to include the new **Professional Body**

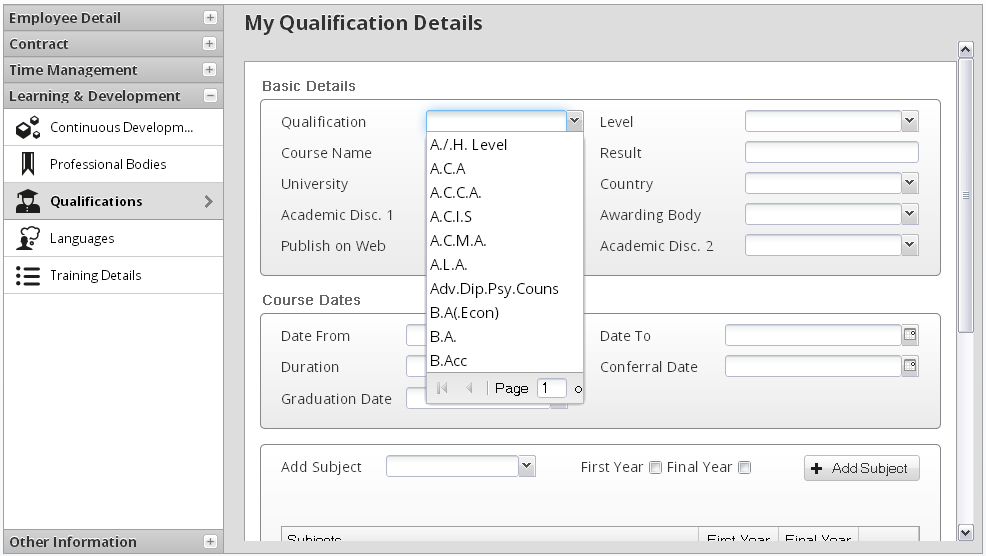


### Qualifications

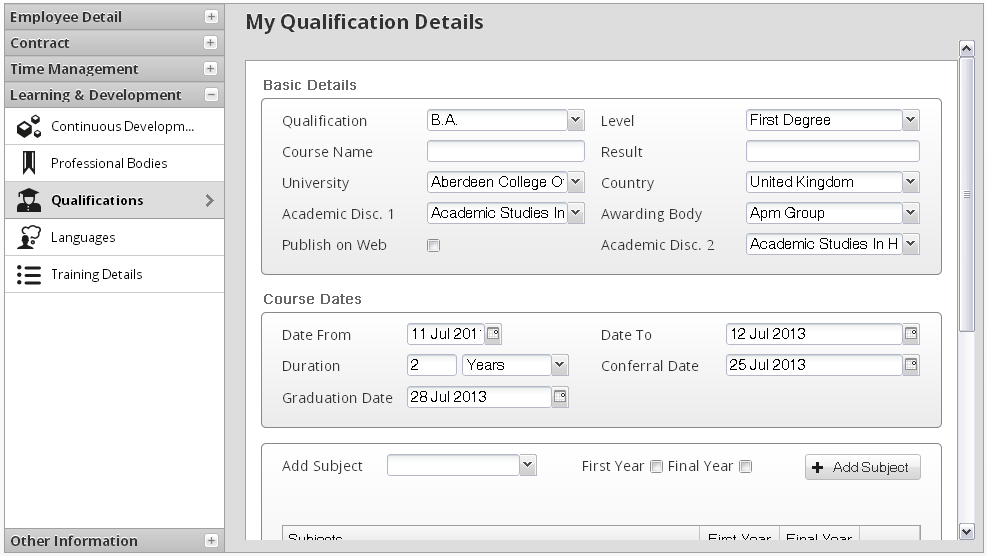
**Select** the **Qualifications** option from the Learning & Development menu > **select** the **Add Qualifications** button so we can add to this screen:



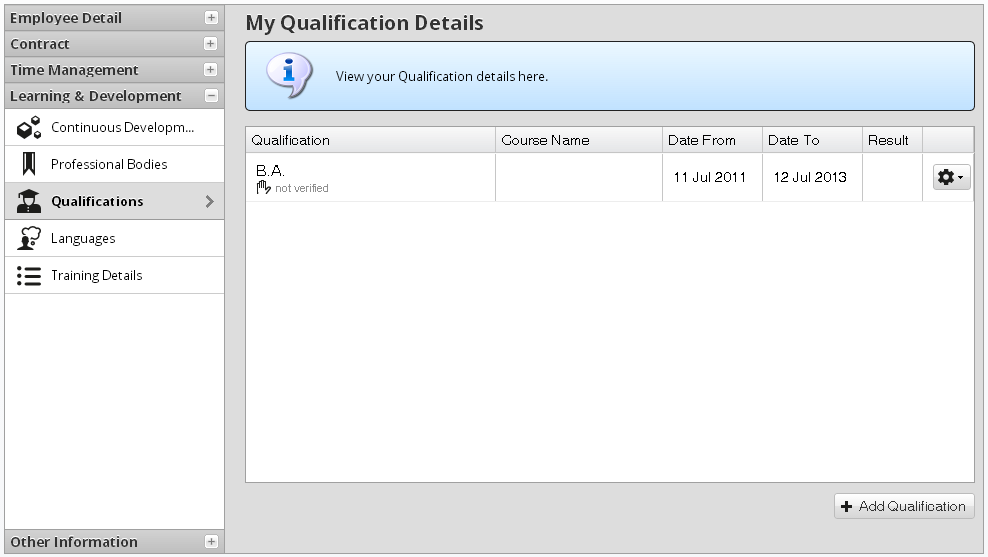
Select the relevant **Qualification** from the drop down list



After the **Qualification** has been selected, continue to fill in the rest of the information and click **Save**

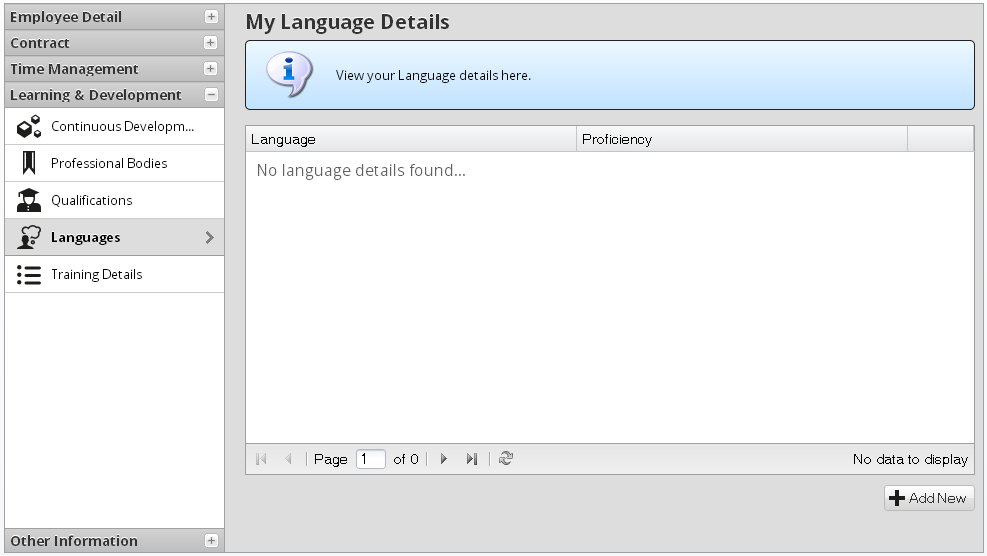


The page will now update to include the new **Qualification**

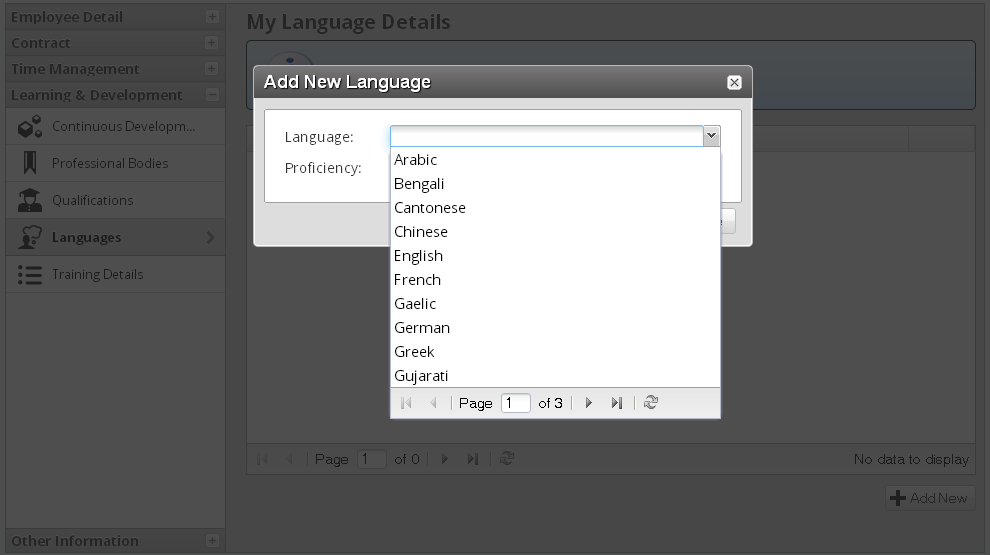


### Languages

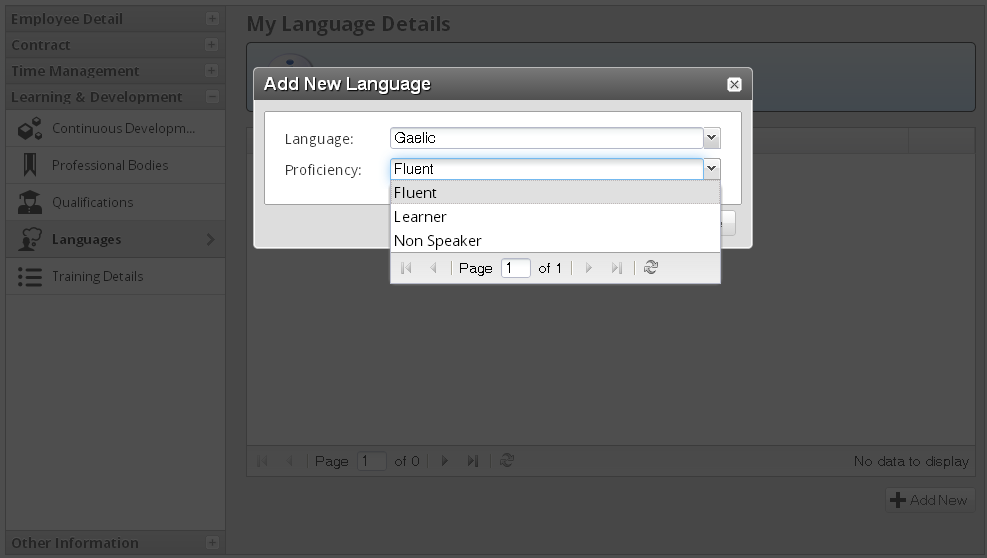
**Select** the **Languages** option from the Learning & Development menu > **select** the **Add New** button so we can add to this screen:



Select the relevant **Language** from the drop down list



Then select the proficiency then click on 



The page will now update to include the new **Languages** details

