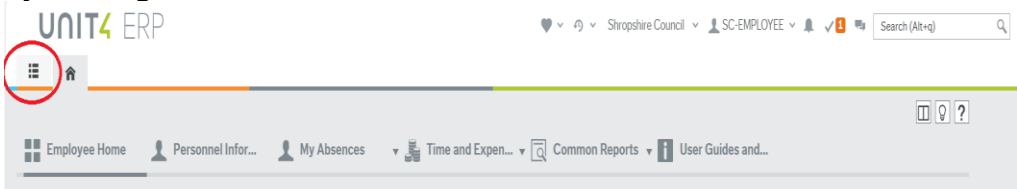
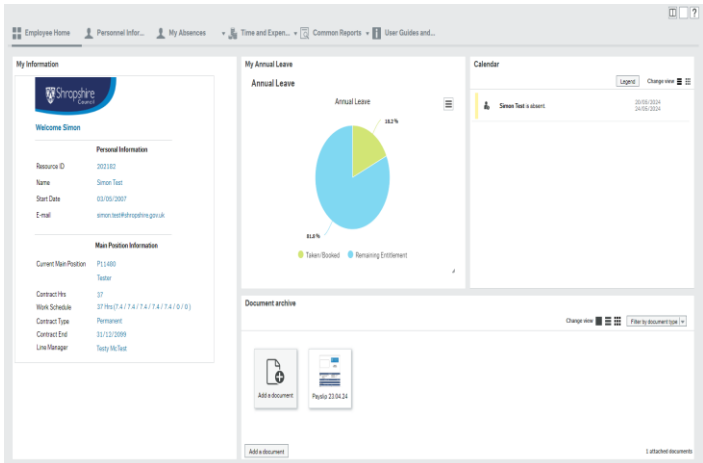
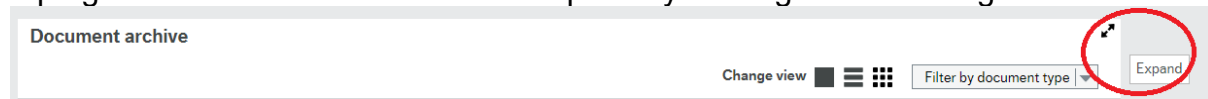


How to use the Home Employee Dashboard

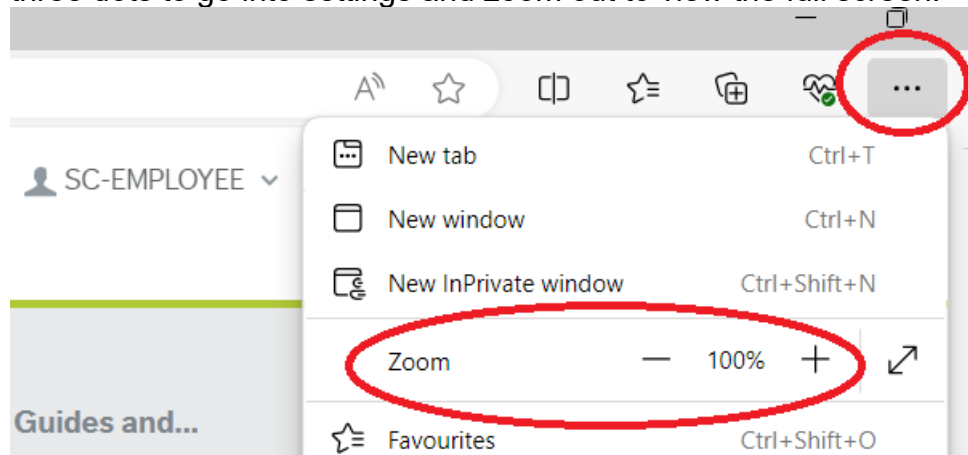
		Last Updated
1	Scope: This guidance is to show you how to use the Home Employee Dashboard in the ERP.	10.05.2024
2	Introduction: The Home Employee Dashboard provides the user with quick access to the most commonly used functions (payslips, requesting absences, claiming timesheets and expenses, common reports and guidance links) in the ERP.	10.05.2024
3	Navigate to: Home Employee Dashboard	10.05.2024
4	Step by step process (with videos and screenshots)	
4.1	The Home Employee Dashboard opens when the user goes into the ERP. The dashboard uses live data so will update every time the ERP is opened. The Main Menu can be accessed straight away without waiting for the data to load by clicking on the Main Menu button on the left. 	06.07.2026
4.2	Employee Home The Employee Home provides the user with a quick overview of the most used functions in the ERP. 	

4.2.1 Navigating

All four sections here can be expanded to full screen by clicking on the arrows in the top right on each section and then collapsed by clicking the arrows again.

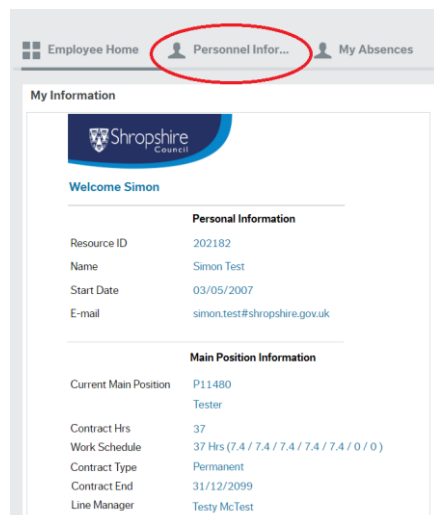


When accessing the ERP on a smaller screen (i.e. a laptop), you may need to make amendments in order to fully view your screen. In the browser toolbar, click on the three dots to go into settings and zoom out to view the full screen.



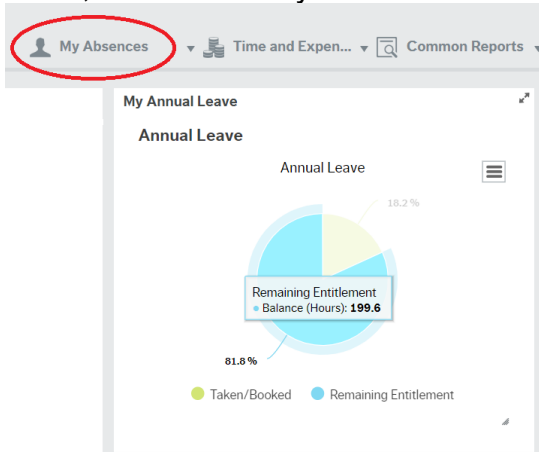
4.2.2 My Information

This section shows basic personal and main position information (i.e. resource ID, start date, current main position, contract hours, work schedule, line manager.) Details for any other positions can be found under Personnel Information.



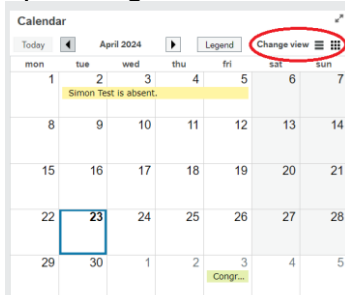
4.2.3 My Annual Leave

There is a pie chart showing annual leave taken/booked and remaining entitlement and gives a quick overview of leave available and what has been taken. To see more detail, click on the My Absences tab.



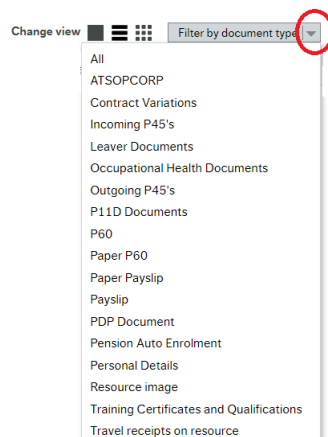
4.2.4 Calendar

There is a calendar where the view can be changed from List to Calendar to show upcoming events such as booked leave.

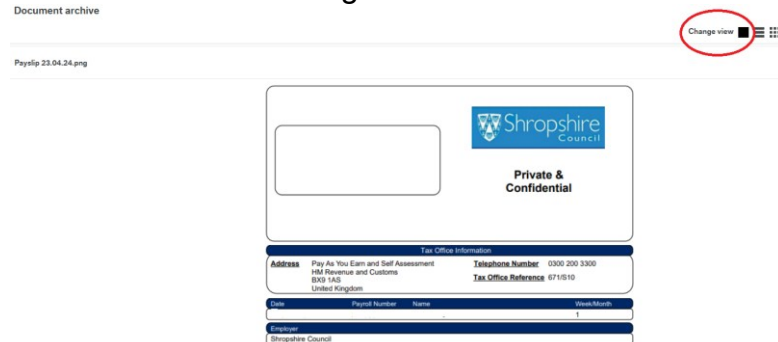


4.2.5 Document archive

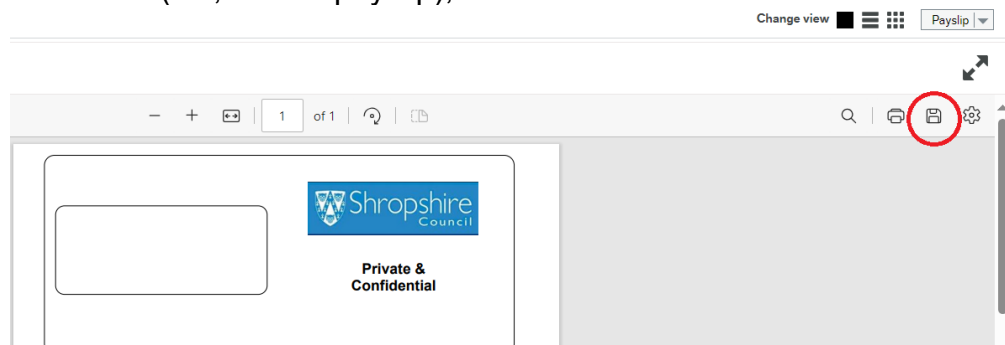
The Document archive gives direct access to payslips, P60s and other employee documents. To have a better view of a document, expand the document archive section. Click on Filter by document type to select a specific document type to narrow down the selection.



The view can be changed from Grid to List which is a list of all the documents or to Detailed to view an image of the documents.

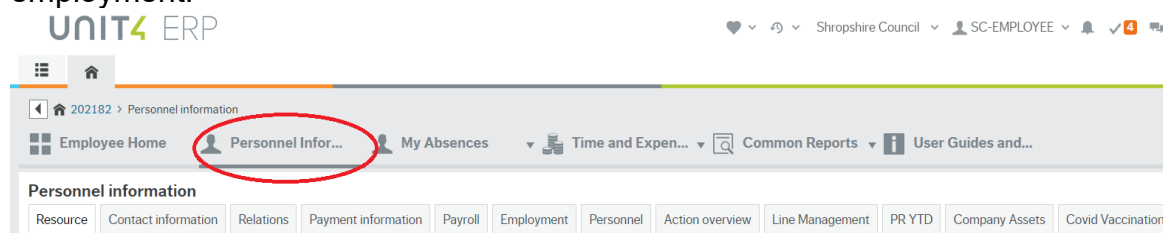


From here the document can be printed or saved. To download and save a document (i.e., P60 or payslip), click on the Save icon to save it to the device.



4.3 Personnel Information

This is a quick link to the Personnel Information section in the Main Menu under Your employment.

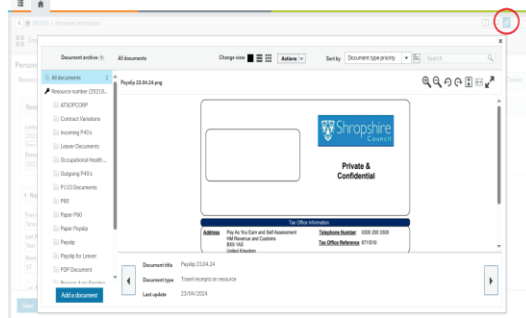


If you change your address or phone number, it is your responsibility to amend these in the ERP by going to the Contact Information tab in Personnel Information, overtyping the current address line (do not delete line or add a new line) and selecting Save.

Payroll have been undertaking an exercise this year to check the formatting of address and postcodes in ERP, removing commas, correcting the format of postcodes etc. Where it is identified that there is an error these are being amended and the employee may receive an automated notification through ERP, or they may be contacted directly.

If you need to make a change to your name, this is done in the Resource tab and the request will workflow to Payroll when you select Save, it won't automatically update. They will need to see sight of the name change by deed poll or a marriage certificate that has been signed and dated by your line manager. Payroll can then authorise the name change on the ERP record.

The Document archive can be viewed through the Personnel Information section by clicking on the paperclip in the top right corner and gives a clear view of the documents.

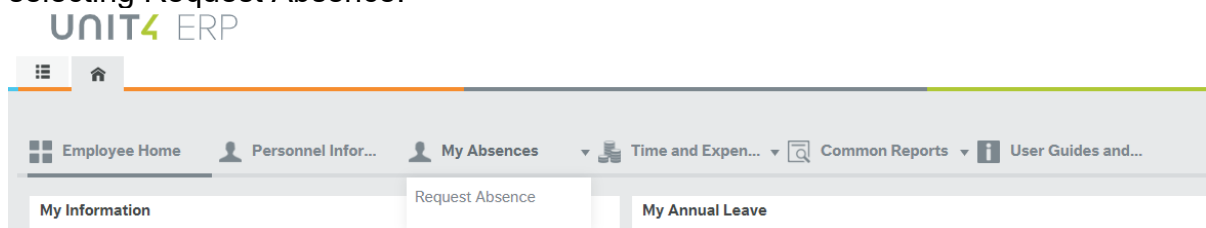


If there are any documents uploaded by mistake (i.e. receipts for expense claims) that need deleting, please contact the Systems Team on ERP@shropshire.gov.uk.

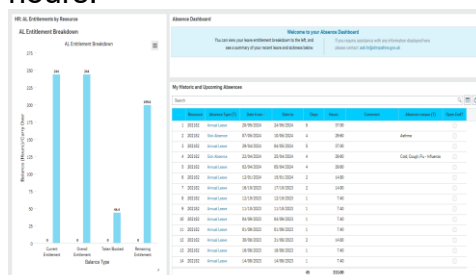
Your employment contract is typically stored in the document archive in Personnel Information. If you do not see your contract in the document archive, please contact the HR team (ask.HR@shropshire.gov.uk) for further assistance, as some documents may not be uploaded automatically for all employees.

4.4 My Absences

This section has a quick link to requesting absences by hovering over the tab and selecting Request Absence.



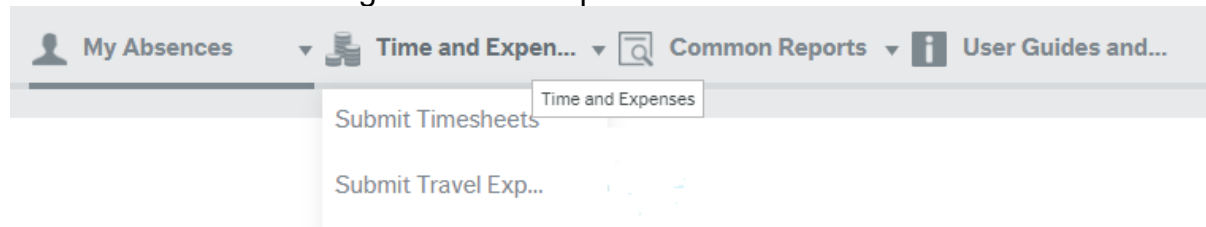
Click on the tab to view a chart of annual leave entitlement breakdown (current entitlement, overall entitlement, taken/booked and remaining entitlement) and a list of historic and upcoming absences including sickness absences shown in days and hours.



4.5

Time and Expenses

This section has quick links to submit timesheets and claim expenses by hovering over the tab and selecting the relevant option.



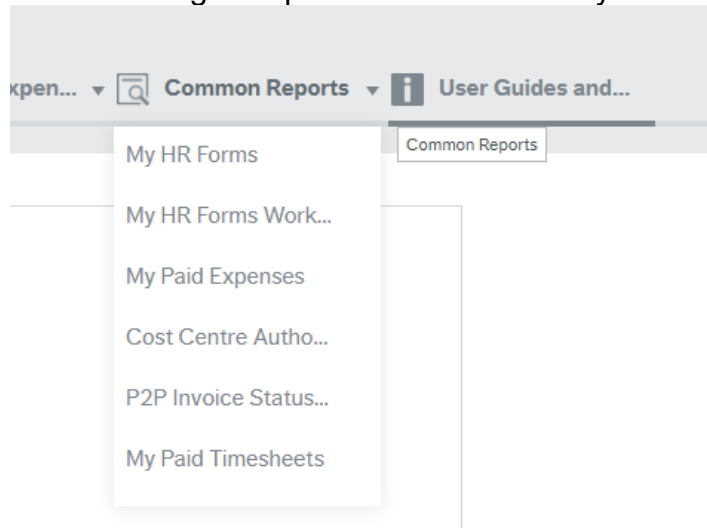
Click on the tab to view claimed timesheets and requested expenses from the last 90 days.

The screenshot displays two sections: 'My Timesheets (Last 90 Days)' and 'My Expenses (Last 90 days)'. The 'My Timesheets' section shows a table with columns: Resource ID, Period, Timesheet, Time code (T), Date, Total, Unit, Position, Hours, and Worksheet date (T). The 'My Expenses' section shows a table with columns: Period, Purpose, Resource ID, Date, Transaction date, Expense code (T), Number Base, Amount, Description, and Worksheet date (T). The table contains several rows of data, including entries for 'Brown Test' and 'P2P Invoice Status'.

4.6

Common Reports

This section gives quick links to commonly used reports.



My HR Forms shows HR forms previously completed with a link back into the form to view the details.

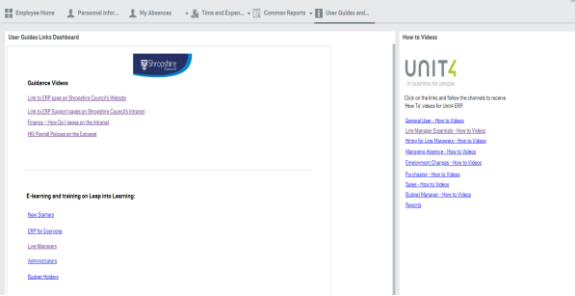
My HR Forms Workflow Status shows where completed forms are in workflow.

My Paid Expenses shows all previously paid expense claims.

Cost Centre Authoriser Enquiry shows the authorises at each level for each cost centre.

P2P Invoice Status Enquiry shows a detailed breakdown of invoices and purchase orders.

My Paid Timesheets shows all previously paid timesheets.

4.7 4.8	User Guides and Supporting Info Links This section has links to guidance, training and "how to" videos.  Knowly Remember to use the in system guidance notes (blue lightbulb in the top right) whilst in the ERP. 	
5	Related guidance and policies Video Links • Tour of the Home Employee Dashboard • Annual Leave – Requesting and Cancelling • How to View and Save Payslips • How to make an Expense Claim • How to complete a Timesheet • How to use Reports in the ERP • How to find and use a Knowly	20.06.2025