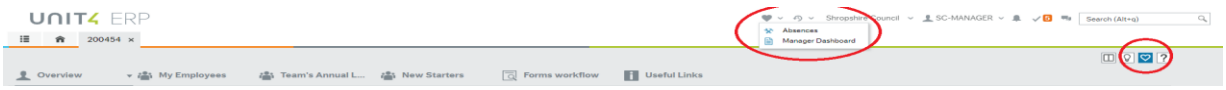
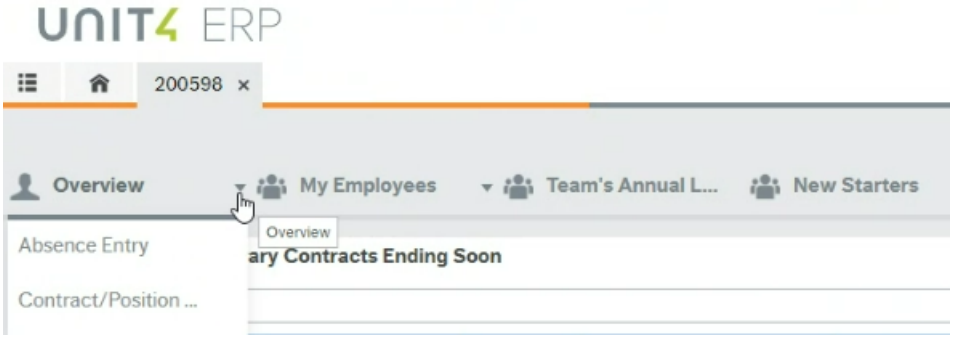
How to find and use the Manager Dashboard

		Last Updated
1	Scope: This guidance shows how to find and use the Manager Dashboard in the ERP.	16.10.2023
2	Introduction: The Manager Dashboard provides managers with useful staffing information in one location. To give better visibility of staff data for monitoring and reviewing to enable any appropriate action to be taken in a timely manner.	16.10.2023
3	Navigate to: Main Menu → Your employment → Your employment → Manager Dashboard	16.10.2023
4	Step by step process:	16.10.2023
4.1	The Manager Dashboard can be set as a Favourite by clicking on the blue heart in the top right to enable quick access from the global toolbar. *(Video link below)*  	19.11.2025
4.2	**Overview** The dashboard opens on the **Overview** tab.  There are links to Absence Entry and the Contract/Position Change Form by clicking on the arrow on the Overview tab that go straight into those sections of the ERP. *(Video links below)*	

4.2.1 This tab shows:

Fixed Term and Temporary contracts ending soon

Fixed Term and Temporary Contracts Ending Soon

Search

	Days Remainin	Resource id (T)	Resource id	Employment type (T)	Date from	Date to	Post id	Post id (T)	Line manager
1	51	Test Emp A	223859	Fixed Term Contract	01/09/2021	31/08/2023	P15037	Test Job 1	200454

This section shows a list of all fixed term and temporary contracts under their line management that have an upcoming end date.

This is to highlight any action that may need taking via the Contract/Position Change Form in the ERP before payroll deadlines. (*Video link below)*

4.2.2 **Absent in the next 14 days**

Absent in the Next 14 Days

Search

	Days until absence ending	Resource id (T)	Resource id	Absence code (T)	Absence code	Date from	Date to	Post id (T)	Post id	Line manager	Line manager (T)
1	0	Test Emp C	201091	Special Paid Leave	SPL	12/07/2023	12/07/2023	Test Job C	P14830	200454	Manager Test
2	2	Test B	205073	Annual Leave	AL	13/07/2023	14/07/2023	Test Job B	P23276	200454	Manager Test
3	3	Simon Test	202182	Sick Absence	SICK	11/07/2023	15/07/2023	Test Employee	P11480	200454	Manager Test
4	3	Test Emp A	223859	Maternity Leave	SMP	16/10/2022	15/07/2023	Test Job 2	P11202	200454	Manager Test
5	3	Test Emp A	223859	Maternity Leave	SMP	16/10/2022	15/07/2023	Test Job 1	P15037	200454	Manager Test

This section shows a list of all their staff's absences over the next 14 days and how many days until the absence ends.

It shows all types of absence including annual leave, special leave, sick leave and maternity leave.

Action may need to be taken via the Absences section in the ERP, the Return to Work Form or the Return to Work from Maternity Leave Form. (*Video links below)*

The Sickness Absence Management Policy under HR & Payroll policies outlines the Council's approach to managing attendance. *(Policy link below)*

Examples of situations where action needs taking:

- Someone is showing as on sick leave but needs to be showing as having returned to work or has an end date that needs extending.
- Someone is approaching the end of their maternity leave.
- Someone has booked annual or special leave and you need to arrange cover for that date.

4.2.3 **Proof of Eligibility**

Proof of Eligibility

Search

	Resource ID (T)	Resource ID	Valid From	Valid To	Documents Uploaded?	Type (T)	Line Manager

This section shows a list of all employees under their line management that have any proof of eligibility documents.
This is to highlight any documents that may be expiring soon.

4.2.4

Additional Payments ending in the next 2 months

Addition Payments Ending in Next 2 Months

Search

	Resource id (T)	Resource id	Payment type (T)	Date from	Date to	Post id	Post id (T)	Line manager
1	Test B	205073	TLR3	01/09/2022	31/08/2023	P23276	Test Job B	200454

This section shows all current additional payments due to end in the next two months. This is to highlight any action that may need taking via the Contract/Position Change Form in the ERP before payroll deadlines. (*Video link below)*

4.2.5

Visa Applications

Visa Applications

Search

Resource ID (T)	Resource ID	Valid From	Expiry Date	Application Date	Application Status (T)	Received Date	Reference Number	Visa / Work Permit Type (T)	Line Manager

This section shows a list of all employees under their line management that have visa applications.
This is to highlight any employee's upcoming expiry dates for visas.

4.2.6

Leavers

Leavers

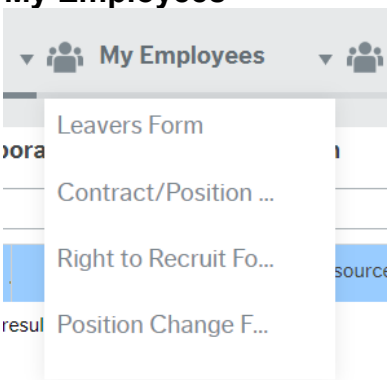
Search

	Name (T)	Name	Cost Centre	Position (T)	Position	Line Manager	Date Raised	Provisional Leave Date	Last Working Day
1	Simon Test	202182	11103	Test Employee	P11480	200454	31/03/2023	31/07/2023	

This section shows anyone with a provisional future leave date.

4.3

My Employees



There are links to the Leavers Form, the Contract/Position Change Form, the Right to Recruit Form and the Position Change Form by clicking on the arrow on the My Employees tab that go straight into those sections of the ERP. (*Video links below)*

4.3.1 This tab shows:

My Employees

My Employees

Search

	Resource id (T)	Resource id	Post id (T)	Post id	Employment type (T)	Started	End Date	Cost Centre	Cost Centre (T)	Line manager
Cost Centre (T): Theatre Severn										
1	Test Emp A	223859	Test Job 2	P11202	Casual	06/06/2022	31/12/2099	11016	Theatre Severn	200454
									Theatre Severn	
Cost Centre (T): Sundorne Infant School										
2	Test Emp A	223859	Test Job 1	P15037	Fixed Term Contract	01/09/2021	31/08/2023	54750	Sundorne Infant Sch...	200454
									Sundorne Infant Sch...	
Cost Centre (T): ICT Infrastructure And Security										
3	Simon Test	202182	Test Employee	P11480	Permanent	01/03/2019	31/12/2099	11103	ICT Infrastructure A...	200454
									ICT Infrastructure A...	

This section shows a list of all employees reporting to the manager.
They are grouped by cost centre if the manager has multiple teams under their line management and includes post, employment type, start date, end date.

4.3.2 **Declaration of Interest Status**

This section shows the status of the Employee Declaration of Interest Form for all positions that report to the manager.
If not completed, the status will show as Outstanding and if the employee has completed the form, the status will show as Complete.

Overview | My Employees | Team's Annual L... | New Starters | HR Forms Work... | Useful Links

Declaration of Interest Status

Search

	Resource ID	Resource ID (T)	Position ID	Position ID (T)	Date Submitted	Status	Line Manager
1	202182	Simon Test	P11480	Tester	18/11/2025	Complete	200454

4.3.3 **Vacant Positions – Compare to budget monitoring**

Vacant Positions - Compare to budget monitoring

Search

Position ID	Job Title	Employment Type	Contract Hours	Pay Scale / Grade	Min Scale Point	Max Scale Point	Line Manager	Line Manager Position	Line Manager Position (T)

This section shows all open positions under the manager's line management that are vacant and helps identify any positions that need closing via the Position Change Form. *(Video links below)*
To identify if any positions showing here have budget attached to them, they will need to be compared to the Budget Monitoring Report. *(Video links below)*

4.3.4 **PDP Status Report**

PDP Status Report

Search

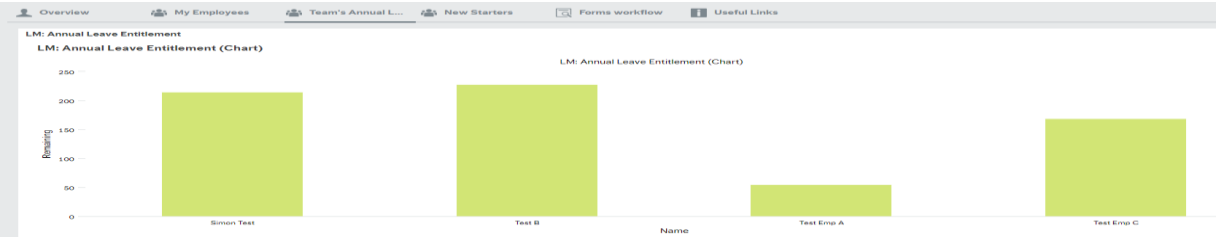
	Resource ...	Resource ID (T)	Position ID	Position ID (T)	PDP Date	PDP Status (meeting should take place every 12 months)	Line Manager
1	202182	Simon Test	P11480	Tester	12/05/2023	Outstanding/Due for Review	200454

This section shows the status of employee's PDP reports.

4.4 **Team's Annual Leave**

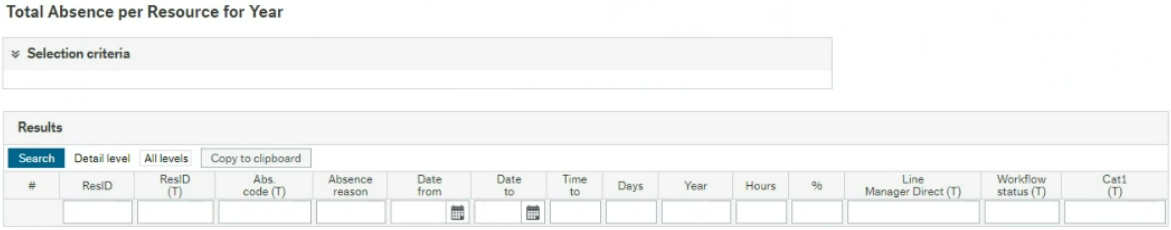
4.4.1 This tab shows:

Team Annual Leave Balance Bar Chart



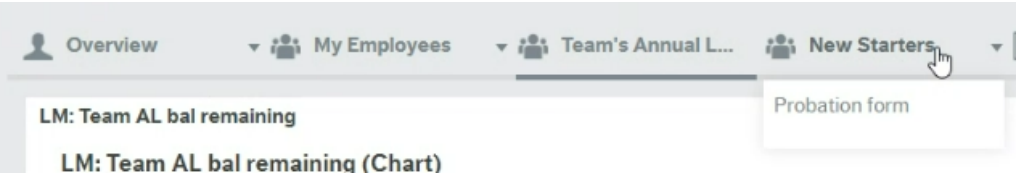
This section shows a chart of team's remaining Annual Leave balances.
It gives a quick overview of how much annual leave each employee has left and when the mouse hovers over the columns, it shows the exact number of hours remaining.

4.4.2 **Total Absence per Resource for Year**



This section shows a report to pull through all the absence data for employees and behaves the same as all reports.
Filter to just Sick Absence or Annual Leave by putting that in the Abs Code (T) field and clicking Search or for a specific employee by putting their resource ID number in ResID and clicking Search.

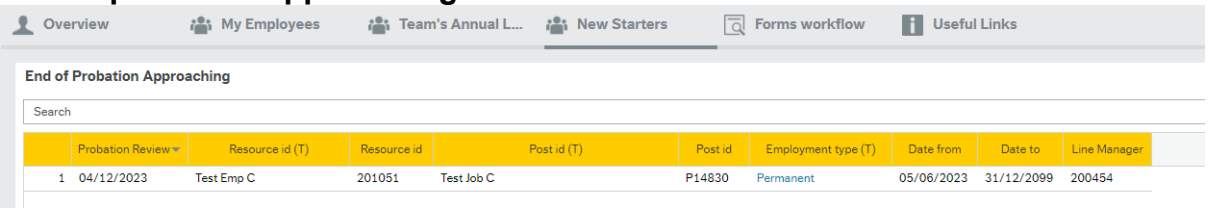
4.5 **New Starters**



There is a link to the Probation Form by clicking on the arrow on the New Starters tab that go straight into those sections of the ERP. *(Video link below)*

4.5.1 This tab shows:

End of probation approaching



	Probation Review	Resource id (T)	Resource id	Post id (T)	Post id	Employment type (T)	Date from	Date to	Line Manager
1	04/12/2023	Test Emp C	201051	Test Job C	P14830	Permanent	05/06/2023	31/12/2099	200454

This section shows a list of employees that have a new position start date and could therefore indicate that they are in a probation period. New position start dates can happen for a variety of reasons so the line manager will need to be aware which of these employees the probationary period applies to by consulting the Probationary Performance Process under HR & Payroll policies. *(Policy link below)*

4.5.2 **New Starters**

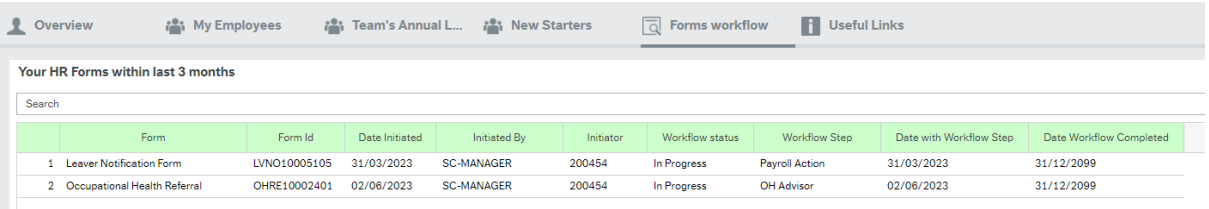
	Resource id (T)	Resource id	Date from	Post id (T)	Post id	Date to	Line Manager
1	Test Emp C	201051	05/06/2023	Test Job C	P14830	31/12/2099	200454

This section shows anyone with a start date between three months ago, and one week in the future.

4.6 **HR Forms Workflow**

4.6.1 This tab shows:

Your HR Forms within last 3 months

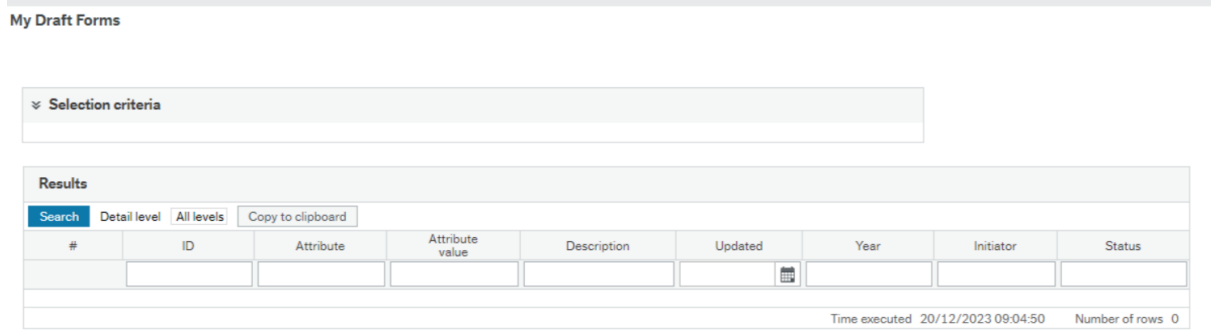


	Form	Form Id	Date Initiated	Initiated By	Initiator	Workflow status	Workflow Step	Date with Workflow Step	Date Workflow Completed
1	Leaver Notification Form	LVNO10005105	31/03/2023	SC-MANAGER	200454	In Progress	Payroll Action	31/03/2023	31/12/2099
2	Occupational Health Referral	OHRE10002401	02/06/2023	SC-MANAGER	200454	In Progress	OH Advisor	02/06/2023	31/12/2099

This section shows the workflow step and status of all HR forms you have submitted in the last 3 months.

4.6.2

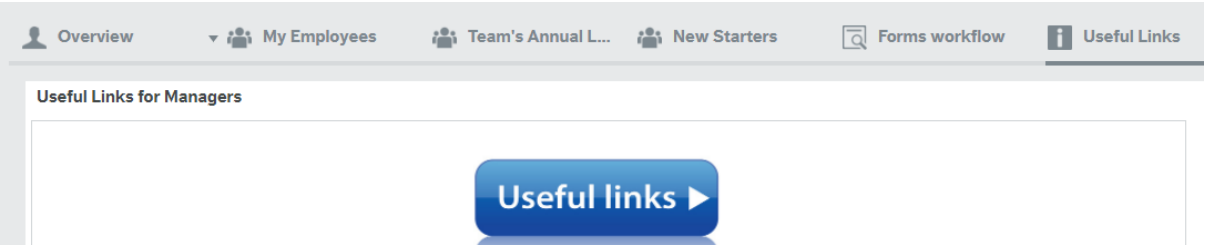
My Draft Forms



This section shows forms completed by the manager that are still in draft. To finish completing and to submit the form, go back into the Forms section and into the relevant form, delete [NEW] in the Form ID field and type the form ID in and tab across or press SPACEBAR to bring up a list of all previously saved or submitted forms.

4.7

Useful Links



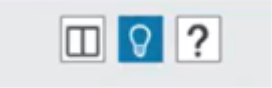
This tab shows links to various how to videos and guidance for assisting line managers.

The line manager links are:

Line Manager Essentials Videos
Hiring for Line Managers Videos
Managing Absences Videos
Employment Changes Videos
Line Manager Training on Leap
HR and Payroll Policies
Payroll Deadlines

The links for assisting with new starters:

IT Access for New Starters
Induction Checklist
Medical Questionnaire for New Starters
Induction for New Starters
Leap into Learning

	4.8	**Knowly** Remember to use the in system guidance notes (blue lightbulb in the top right) whilst in the ERP. 	
5	Related guidance and policies <u>Video Links</u> • Manager Dashboard • How to Add Favourites • Contract/Position Change Form • Unplanned Absences - Adding and Amending • Return to Work Form • Return to Work from Maternity Form • Leaver Notification Form for Managers • Position Change Form • Right to Recruit Form • How to Access the Budget Monitoring Report • Probation Form • How to find and use a Knowly <u>Policies</u> • Sickness Absence Management Policy • Managing Employee Performance Policy <u>Training on Leap into Learning</u> • ERP Essentials for Line Managers • ERP Recruitment and Onboarding • ERP Managing Absence • ERP Employment Changes		02.10.2025