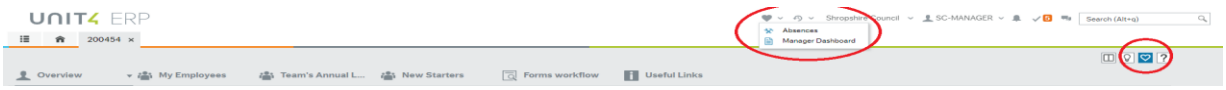
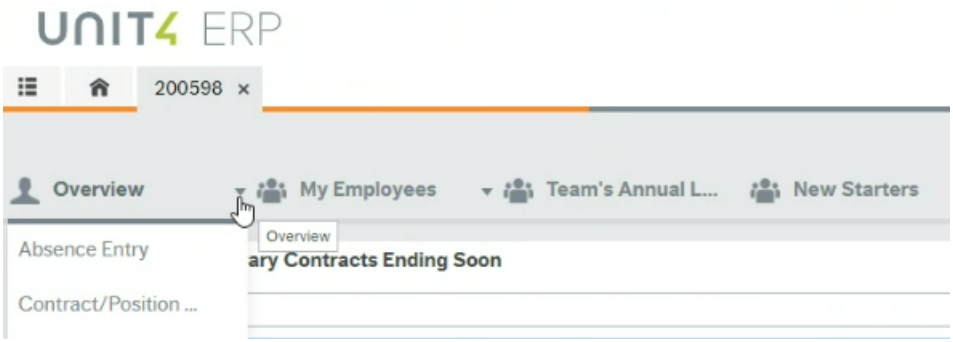
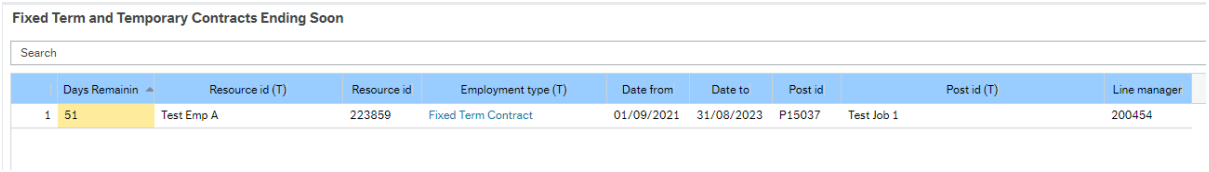
How to find and use the Manager Dashboard

			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. 	28.10.2026
	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.	

4.2.1 This tab shows:

Fixed Term and Temporary contracts ending soon


Fixed Term and Temporary Contracts Ending Soon

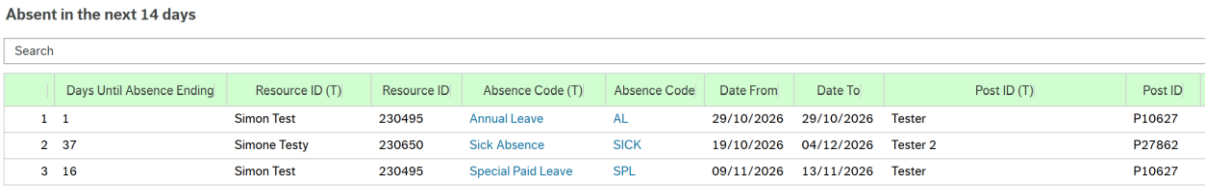
Search

	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.

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
1	1	Simon Test	230495	Annual Leave	AL	29/10/2026	29/10/2026	Tester	P10627
2	37	Simone Testy	230650	Sick Absence	SICK	19/10/2026	04/12/2026	Tester 2	P27862
3	16	Simon Test	230495	Special Paid Leave	SPL	09/11/2026	13/11/2026	Tester	P10627

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.

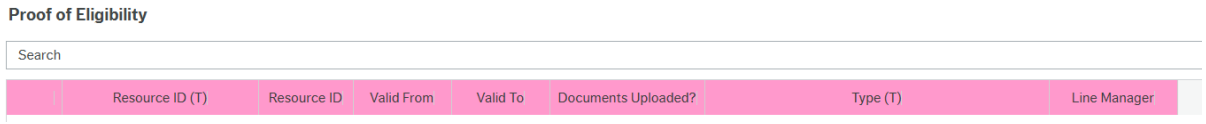
Action may need to be taken via the Absences section in the ERP, the Return to Work Form or the Return to Work from Maternity Leave Form.

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

Examples of situations where action needs taking:

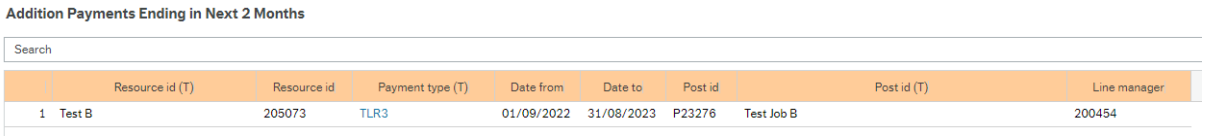
- Someone is showing on sick leave but has returned to work so their absence needs ending or someone who's sick leave will go past the end date that is showing so that needs extending.
- Someone is approaching the end of their maternity leave.
- Someone has booked annual or special leave and you need to arrange cover for that date.

4.2.3 Proof of Eligibility



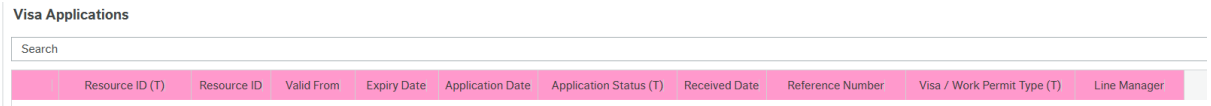
This section shows a list of all employees under their line management that have any proof of eligibility documents.
This is to highlight any documents that may be expiring soon.

4.2.4 Additional Payments ending in the next 2 months



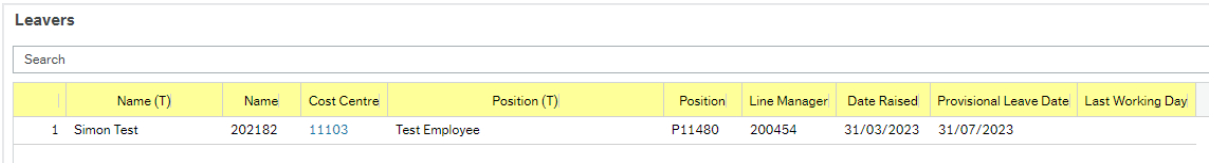
This section shows all current additional payments due to end in the next two months.
This is to highlight any action that may need taking via the Contract/Position Change Form in the ERP before payroll deadlines.

4.2.5 Visa Applications



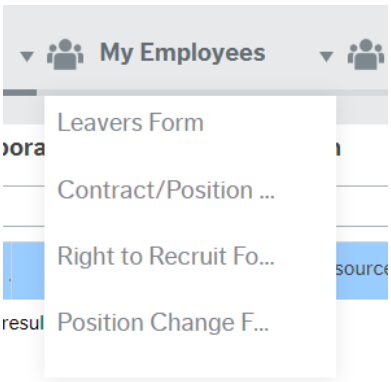
This section shows a list of all employees under their line management that have visa applications.
This is to highlight any employee's upcoming expiry dates for visas.

4.2.6 Leavers



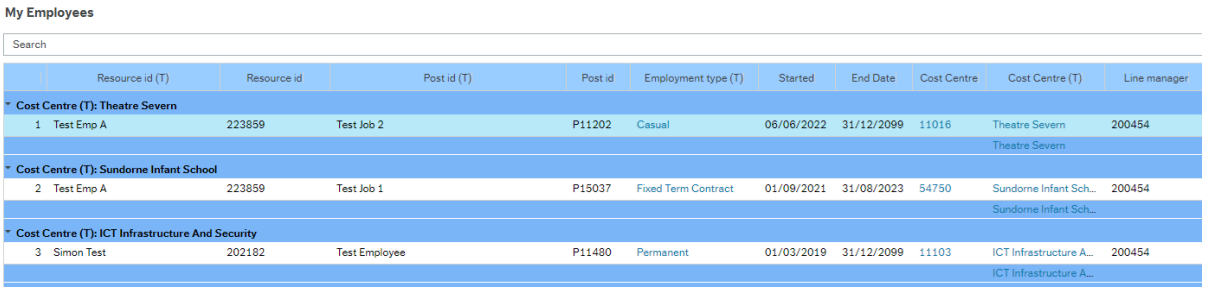
This section shows anyone with a provisional future leave date.

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.

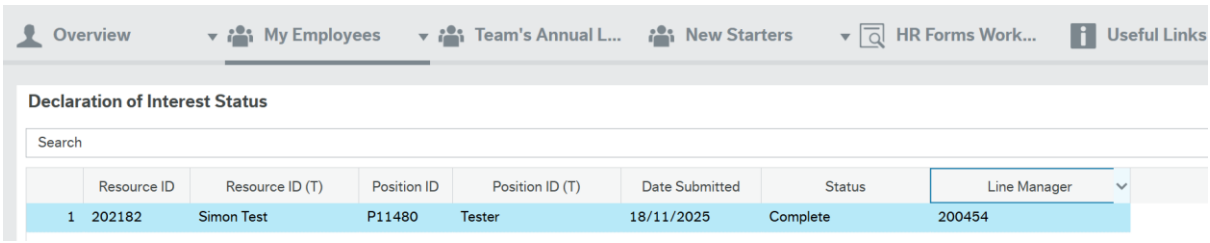
4.3.1 This tab shows:
My Employees



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.



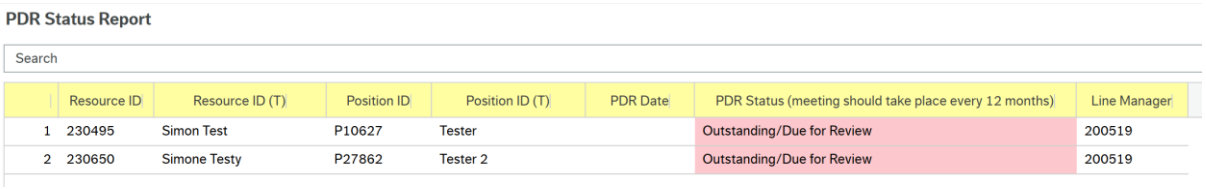
4.3.3 **Vacant Positions – Compare to budget monitoring**



	Position ID	Job Title	Employment Type	Contract Hours	Pay Scale / Grade	Min Scale Point	Max Scale Point
1	P27863	Information Governan...	Permanent	37.00	NJCAG8-G10CG	NJCA19	NJCA22

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.
To identify if any positions showing here have budget attached to them, they will need to be compared to the Budget Monitoring Report.

4.3.4 **PDR Status Report**

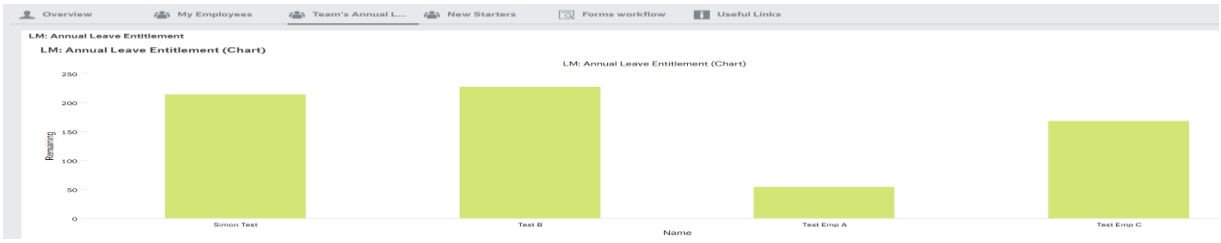


	Resource ID	Resource ID (T)	Position ID	Position ID (T)	PDR Date	PDR Status (meeting should take place every 12 months)	Line Manager
1	230495	Simon Test	P10627	Tester		Outstanding/Due for Review	200519
2	230650	Simone Testy	P27862	Tester 2		Outstanding/Due for Review	200519

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

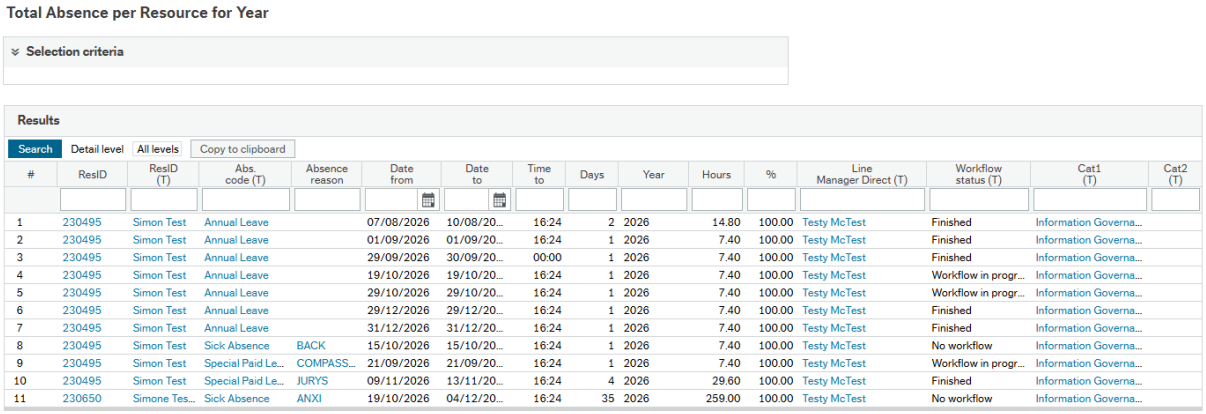
4.4 **Team's Annual Leave**

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.

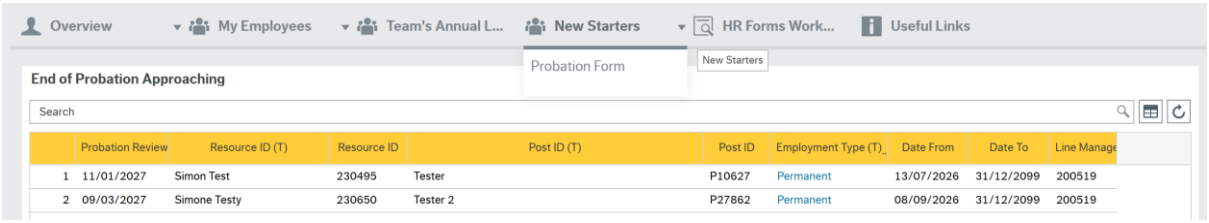
4.4.2 **Total Absence per Resource for Year**



#	ResID	ResID (T)	Abs. code (T)	Absence reason	Date from	Date to	Time to	Days	Year	Hours	%	Line Manager Direct (T)	Workflow status (T)	Cat1 (T)	Cat2 (T)
1	230495	Simon Test	Annual Leave		07/08/2026	10/08/20...	16:24	2	2026	14.80	100.00	Testy McTest	Finished	Information Governa...	
2	230495	Simon Test	Annual Leave		01/09/2026	01/09/20...	16:24	1	2026	7.40	100.00	Testy McTest	Finished	Information Governa...	
3	230495	Simon Test	Annual Leave		29/09/2026	30/09/20...	00:00	1	2026	7.40	100.00	Testy McTest	Finished	Information Governa...	
4	230495	Simon Test	Annual Leave		19/10/2026	19/10/20...	16:24	1	2026	7.40	100.00	Testy McTest	Workflow in progr...	Information Governa...	
5	230495	Simon Test	Annual Leave		29/10/2026	29/10/20...	16:24	1	2026	7.40	100.00	Testy McTest	Workflow in progr...	Information Governa...	
6	230495	Simon Test	Annual Leave		29/12/2026	29/12/20...	16:24	1	2026	7.40	100.00	Testy McTest	Finished	Information Governa...	
7	230495	Simon Test	Annual Leave		31/12/2026	31/12/20...	16:24	1	2026	7.40	100.00	Testy McTest	Finished	Information Governa...	
8	230495	Simon Test	Sick Absence	BACK	15/10/2026	15/10/20...	16:24	1	2026	7.40	100.00	Testy McTest	No workflow	Information Governa...	
9	230495	Simon Test	Special Paid Le...	COMPASS...	21/09/2026	21/09/20...	16:24	1	2026	7.40	100.00	Testy McTest	Workflow in progr...	Information Governa...	
10	230495	Simon Test	Special Paid Le...	JURYS	09/11/2026	13/11/20...	16:24	4	2026	29.60	100.00	Testy McTest	Finished	Information Governa...	
11	230650	Simone Tes...	Sick Absence	ANXI	19/10/2026	04/12/20...	16:24	35	2026	259.00	100.00	Testy McTest	No workflow	Information Governa...	

This section shows a report to pull through all the annual leave and 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.

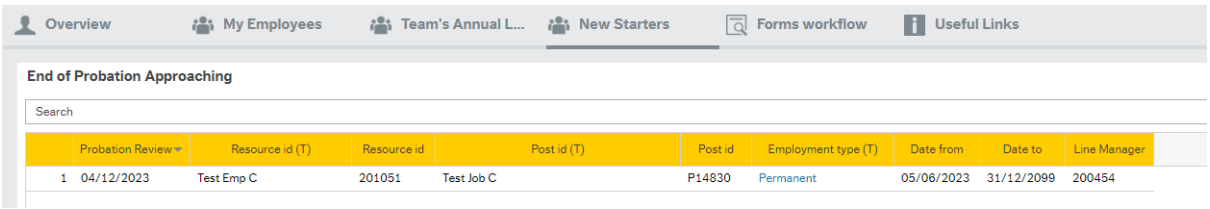
4.5 **New Starters**



	Probation Review	Resource ID (T)	Resource ID	Post ID (T)	Post ID	Employment Type (T)	Date From	Date To	Line Manage
1	11/01/2027	Simon Test	230495	Tester	P10627	Permanent	13/07/2026	31/12/2099	200519
2	09/03/2027	Simone Testy	230650	Tester 2	P27862	Permanent	08/09/2026	31/12/2099	200519

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.

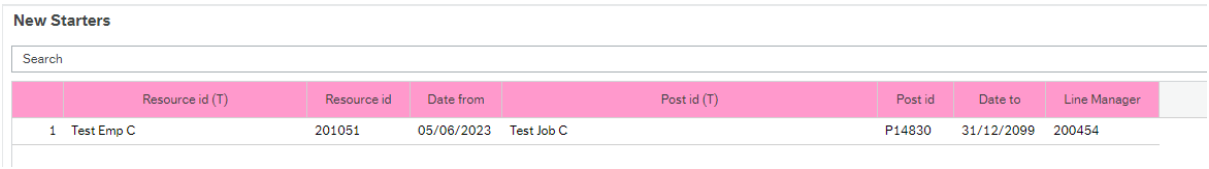
4.5.1 This tab shows:
End of probation approaching



	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.

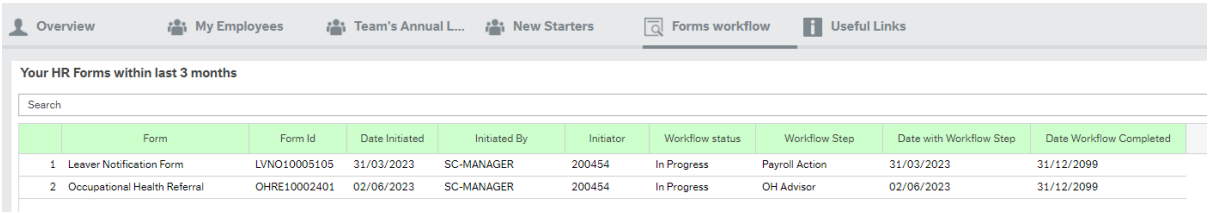
4.5.2 **New Starters**



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

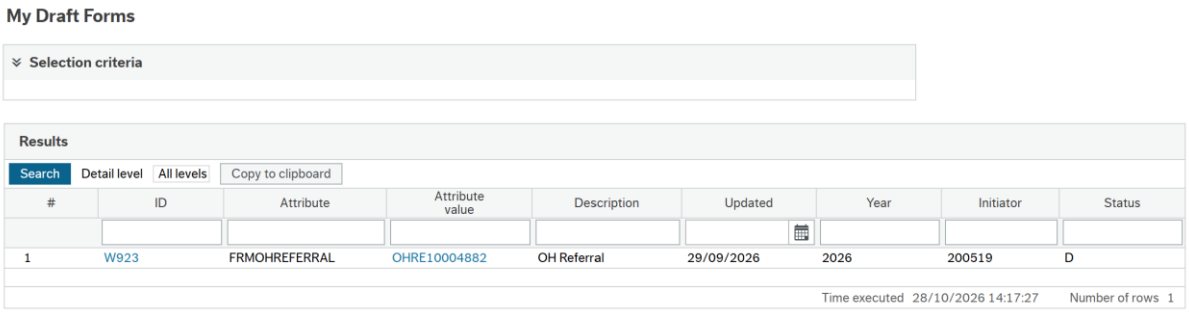
4.6 **HR Forms Workflow**

4.6.1 This tab shows:
Your HR Forms within last 3 months

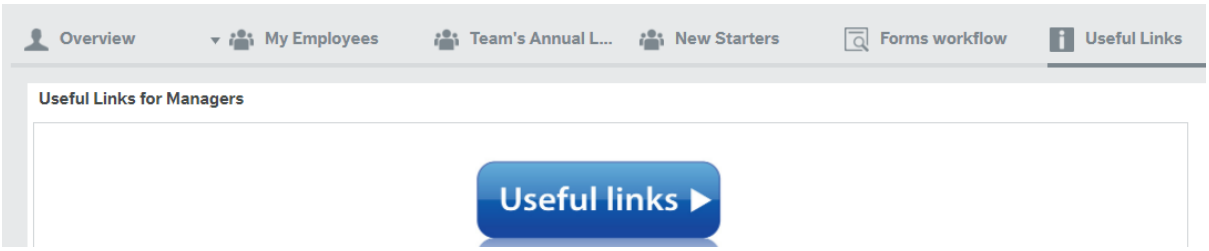
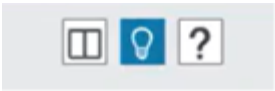


This section shows the workflow step and status of all HR forms you have submitted in the last 3 months. This section can be used to find the form ID numbers for your submitted forms.

4.6.2 **My Draft Forms**



This section shows forms completed by the manager that are still in draft. This section can be used to find the form ID numbers for your draft forms. 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.	
	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 Video Links • Manager Dashboard • Contract/Position Change Form • Unplanned Absences - Adding and Amending • Return to Work Form • Return to Work from Maternity Form • Leaver Notification Form • Position Change Form • Right to Recruit Form • How to Update the Budget Monitoring Report • Probation Form • How to find and use a Knowly • Establishment for Managers Policies • Sickness Absence Management Policy • Managing Employee Performance Policy Training on Leap into Learning • ERP Essentials for Line Managers • ERP Recruitment and Onboarding • ERP Managing Absence • ERP Employment Changes		18.03.2026