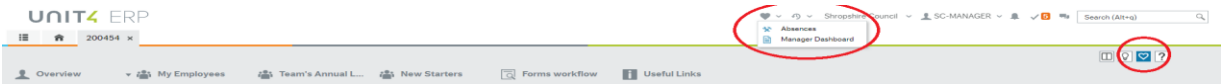
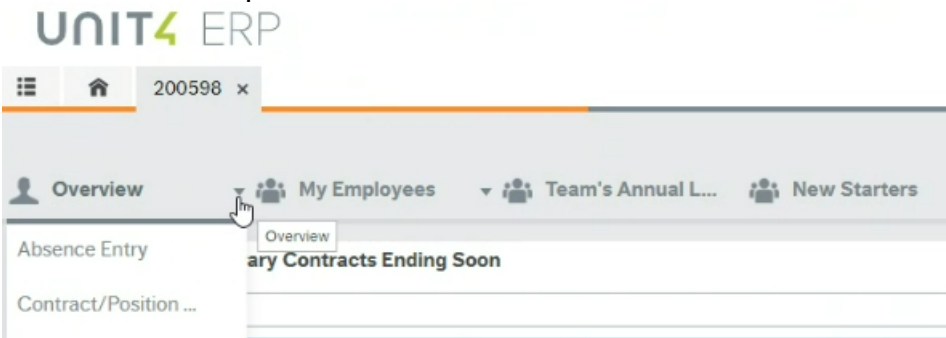


How to find and use the Manager Dashboard

| | | Last Updated |
|-----|---|--------------|
| 1 | <p>Scope: This guidance shows how to find and use the Manager Dashboard in the ERP.</p> | 16.10.2023 |
| 2 | <p>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.</p> | 16.10.2023 |
| 3 | <p>Navigate to: Main Menu → Your employment → Your employment → Manager Dashboard</p> | 16.10.2023 |
| 4 | <p>Step by step process:</p> | 16.10.2023 |
| 4.1 | <p>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. <i>(Video link below)</i></p>  | 19.11.2025 |
| 4.2 | <p>Overview</p> <p>The dashboard opens on the Overview tab.</p>  <p>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. <i>(Video links below)</i></p> | |

4.2.1 This tab shows:
Fixed Term and Temporary contracts ending soon

Fixed Term and Temporary Contracts Ending Soon

Search

| Days Remain | 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 10 | 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 | P2276 | 200454 | Manager Test |
| 3 3 | Simon Test | 202182 | Sick Absence | SICK | 15/07/2023 | 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 | P11302 | 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.

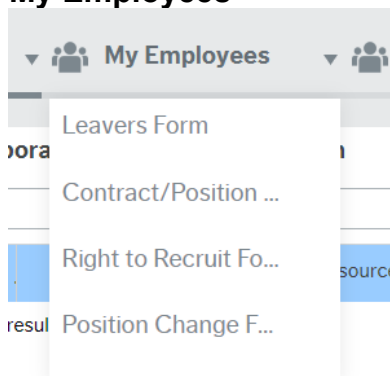
4.2.6 **Leavers**

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 |
| 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 |
| 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 |

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

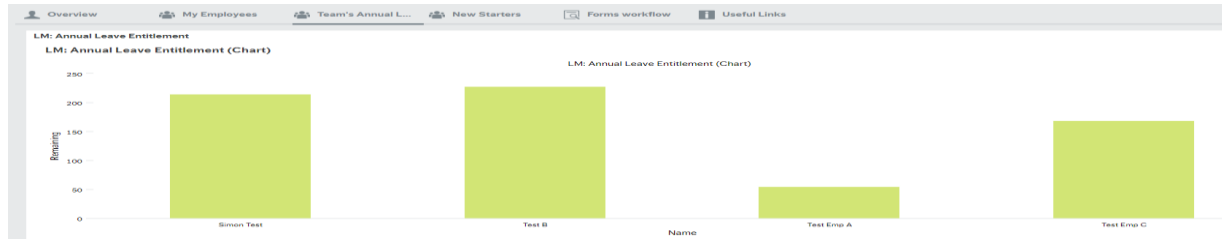
| | Resource ... | Resource ID (T) | Position ID | Position ID (T) | PDP Date | PDP Status (meeting should take place every 12 months) | Line Manager |
|---|--------------|-----------------|-------------|-----------------|------------|--|--------------|
| 1 | 202182 | Simon Test | P11480 | Tester | 12/05/2023 | 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**

Total Absence per Resource for Year

Selection criteria

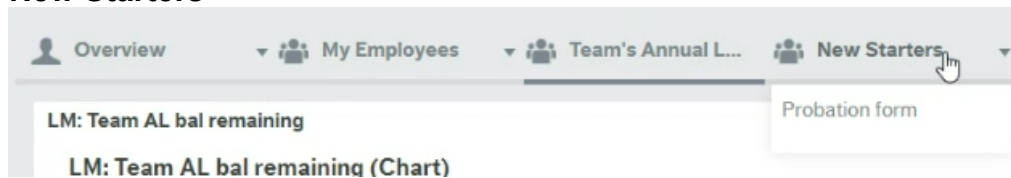
Results

Search Detail level All levels Copy to clipboard

| # | 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) |
|---|-------|-----------|---------------|----------------|-----------|---------|---------|------|------|-------|---|-------------------------|---------------------|----------|
| | | | | | | | | | | | | | | |

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

My Draft Forms

Selection criteria

Results

Search Detail level All levels Copy to clipboard

| # | ID | Attribute | Attribute value | Description | Updated | Year | Initiator | Status |
|---|----|-----------|-----------------|-------------|---------|------|-----------|--------|
| | | | | | | | | |

Time executed 20/12/2023 09:04:50 Number of rows 0

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

Overview My Employees Team's Annual L... New Starters Forms workflow Useful Links

Useful Links for Managers

Useful links ▶

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

The line manager links are:

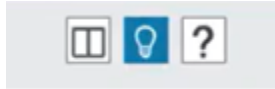
- [Line Manager Essentials Videos](#)
- [Hiring for Line Managers Videos](#)
- [Managing Absences Videos](#)
- [Employment Changes Videos](#)
- [Line Manager Training on Leap](#)
- [HR and Payroll Policies](#)
- [Payroll Deadlines](#)

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

18.03.2026

Video Links

- [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](#)
- [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](#)